

TERRADISE COMPUTER SYSTEMS, INC.

TerraPro Professional Funeral Home Software



TerraPro User Manual

TERRADISE COMPUTER SYSTEMS, INC.

TerraPro Instruction Manual

This Manual Written by
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For TerraPro Version 9.12.00 and above
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This manual is supplied separately from the TerraPro program and sells for \$75.00.

Replacement manuals and/or sheets are available at the address above.

The current version of this manual can be downloaded free of charge as a Microsoft Word™ Document or Adobe Acrobat™ PDF file from our website at www.terradise.net

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Using TerraPro

How to use TerraPro to save time, avoid data errors and streamline your paperwork.

TerraPro Professional Funeral Home Software is designed to save you time. Although TerraPro was written to be easy to use, this manual can help you by pointing out some of the timesaving features you may have missed while using TerraPro. Throughout the manual, you will see icons (little pictures or figures), which will point out information you may want to remember.

When you see icons next to paragraphs, look for valuable information about topics of interest, test your grasp of a particular subject, or get “hands-on” keyboard experience in trying out various tasks.



We suggest you keep the manual near your computer for quick reference. Use the Table of Contents or Index to quickly find the answer to the question you have. If you cannot find the answer in the manual, please don't hesitate to phone us at 513-484-9729 or email us at haldemandavid@gmail.com

How to Start TerraPro



After TerraPro is installed on your computer you will have an icon (pictured at left) on your main computer screen (called the desktop) or on your Windows 8/10 Start Menu. Using your mouse, move the cursor (usually an arrow – it's the thing that moves when you move the mouse) so that it is over the TerraPro icon (at left) and click twice quickly (this is called double-clicking). If this doesn't start the program, try double-clicking a little slower. If it still doesn't start, use the right-hand mouse button and click once over the icon, then left-click over the word Open.



Adjusting the Double Click Speed

The speed of the double click can be adjusted. Click on the Windows Start button, choose Control Panel, choose Mouse, and adjust the Double-Click speed to your liking. Click OK to save and close the Control Panel by clicking the X in the upper right corner.

Choosing a Company

After starting TerraPro, you may or may not see a Company Selection Screen. If you do not, and the program just starts opening files and presents you with the main TerraPro screen as shown below, this means you only have one company set up. When we refer to companies, we mean branches of the funeral home, or Pre-need companies set up to handle the Pre-need cases for your funeral home. Each company provides separate accounting, billing and reporting functions.

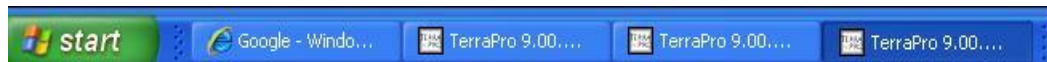
- To setup a new branch or Pre-need company. See Appendix B, setting up new companies. You will need to obtain a license file for each new company or branch you add, if the name is different. Call TerraPro at 513-484-9729 to revise your license.
- To select a company, click on the image of the desired company.
- To quit without selecting a company, press the Escape key (upper left of your keyboard labeled “Esc” or click the Quit button

Mouse or Keyboard?

Many times, you can use the Enter or Tab key on the keyboard rather than reaching for the mouse. To navigate (move around) lists using the keyboard, use the up and down arrow keys.



Something to watch for: Occasionally, you may click on the TerraPro icon on your desktop more than once, and you may start more than one instance of the program. This can cause unexpected results, as TerraPro will behave as if two people are using the program at the same time. This is not a problem on a network (two or more computers linked together as one), but it is a waste of resources of your computer.



To assure that you only have one copy, check the taskbar at the bottom of your screen (or top or sides if you have moved it) to see if there is another copy running. If it looks like the task bar shown above, select a copy by clicking on it, and close it down using the Quit button in the lower left corner. Keep closing until you have only one copy of TerraPro running. This same warning applies to other programs you might be running, too. Many users have reported they keep two or three copies running to work on multiple cases, but we cannot guarantee the program to work as described in this manual if you follow this practice.

Main TerraPro Screen

We will refer to this screen often throughout this manual.

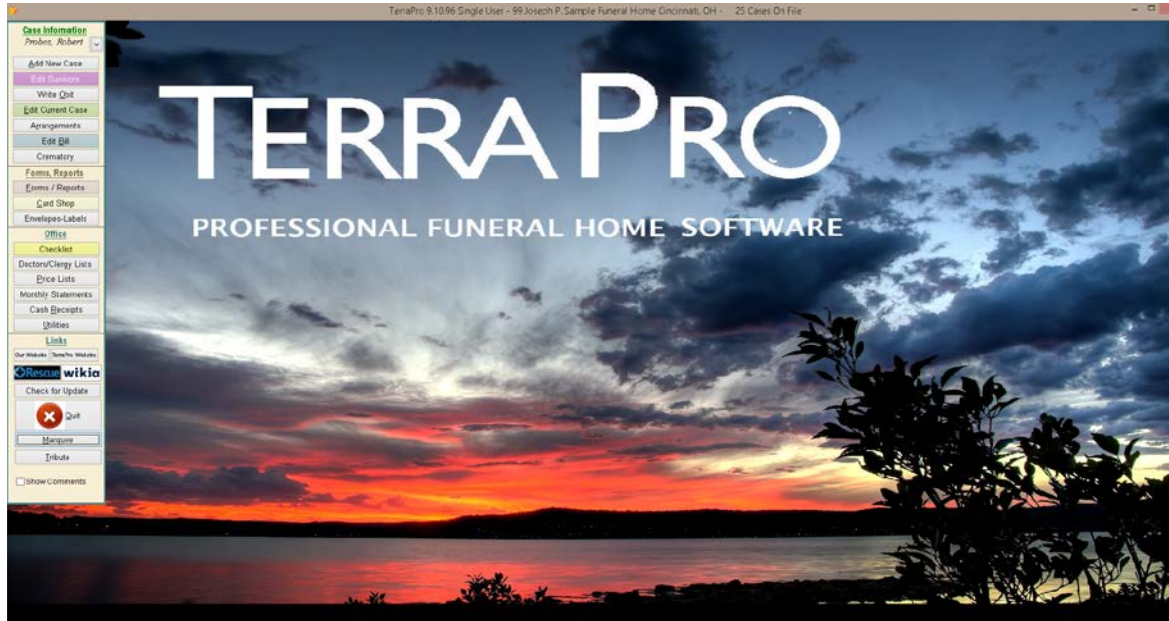


FIGURE 1 Main TerraPro Screen or Window.

If you don't like the picture supplied as background or wallpaper for TerraPro, you can change it!

To change the picture, use the right mouse button and click on it. This brings up a box known as the dialogue box. Dialogue means having a conversation with someone. In this case the computer is asking you a question: *"What picture do you want to use as your wallpaper?"* We will use the mouse to find a file containing the picture you desire.



Let's Do It! TerraPro wallpaper picture files are stored in a folder called images/wallpaper. You also may have pictures in your My Documents/My Pictures folder*. We suggest that all TerraPro related pictures be stored in the TerraPro\Images folder so they may be easily accessed from your network. If you double click your cursor on the folder icon labeled images, then double click again on the folder labeled wallpaper, you will see a list of files describing the wallpaper pictures. Click once on one and you will see a preview of the image. Double click it to choose it.

If you cancel choosing a picture, you will get no picture. You will be asked if this is a permanent change, or just for this session. This is handy if you want to have a plain color as your background. Right click on the plain background to change the color. Unless you made this change permanent, the next time you start TerraPro the picture will be back!

Why do all this just for a picture?

Later on, when we print memorial folders with pictures, you will use this same technique to choose a picture for the card. Practicing it now will save you learning time later on when you need cards in a hurry! **Learning to navigate around your computer's files and folders is extremely helpful and strongly suggested.**

* We STRONGLY suggest you place all funeral related images in the TerraPro Images folder so that all users have easy access to them.

Adding a New Case

TerraPro is setup to allow you to quickly add a new case without having to know all the case information. When you receive a death call (we'll call it the **First Call**), you can start the case information right away and then update the vital statistics gathered at the family arrangement conference later on.



Let's do it! Click on the Main TerraPro Screen choice labeled Add New Case. The computer will ask for a case number. This is important, as it uniquely identifies each case. Typically, we recommend using the year and then a consecutive number (2015-001 for the first case of the year 2015). You can setup other numbering schemes if required, but we suggest one that will allow the cases to be put in order by file number for easy retrieval.

If you are happy with the file number, just click ok or press enter. Don't worry, TerraPro has already checked to see if the file number is unique and won't let you enter a duplicate file number.

If you need to change the file number, edit the file number to your liking. Keep in mind that TerraPro will verify that the file number you enter does not already exist, but it won't keep you from skipping a file number. If in doubt, click Cancel and then pull-down the list of cases and check the most recent file numbers. ***To start a new year, just type over the existing year to change it.***

To reset the automatic file number sequence, Choose Utilities, Setup. On the setup screen you will find a field called "Last File number Used". Change it to the last file number used – click on the Quit button and answer Yes to "Update System?"

You can renumber a case file number at any time, so don't spend a lot of time fussing about the file number if you are not sure, or if you make a typing error. Choose Utilities, Re-number, and follow the on-screen instructions.

First Call Screen¹

The information you will type in on this screen is the basic information you might know after receiving the death call. If you don't know the information, just skip over it, because you can always enter it later. However, the more you enter here, the better TerraPro can help with information entered later. In some states, you can enter the information online and have the certified copies of death certificate sent to you as soon as the doctor electronically signs it.

The screenshot shows the 'First Call' window with a yellow background and a blue title bar. The title bar says 'First Call'. Below it, the section is titled 'First Call Information'. There are two radio buttons: 'Enter Info Here' (selected) and 'Enter Info Online'. The form contains the following fields and options:

- Name of Deceased (First (Middle) Last):** John William Doe
- Date of Death:** 10/19/2011 (with a calendar icon)
- Place of Death:** Radio buttons for Inpatient, ER/Outpatient, DOA, Nursing Home (selected), Residence, Hospice, and Other (Specify).
- Enter Location:** Old Economics Professor Nursing Home (with a dropdown arrow)
- City:** Villa Hills
- County:** Campbell
- State:** KY
- Country:** (Empty field with text '(Leave Blank for USA)')
- Contact:** Nurse Kate (with text '(Name of person reporting death - NOT INFORMANT)')
- Informant's Name:** Roger Doe (with a dropdown arrow)
- What relationship to deceased?:** Son
- Address:** 123 Main Street
- City, State ZIP:** Villa Hills, KY 41014
- Phone:** 859-555-5555
- Arrangements Conf. Date/Time:** 10/20/2011 09:00 AM (with a calendar icon)
- Buttons:** Cancel, Check if Preneed Case (checkbox), and Click here when Finished (red button).
- Text:** <-- Click to choose from previous survivor list (next to the Informant's Name dropdown).

Figure 2 - First Call Screen

Enter the name of the deceased in standard format: John William Doe (first, middle, last). If the person has a hyphenated last name enter it like this: Mary Beth Smith-Doe. Keep in mind the case will be alphabetized under Smith-Doe, not Doe-Smith. If you do not know the full name, just enter as much as you know; you can always change it later.

Pressing Enter or Tab will allow you to enter the date of death (if known) (be sure to use zeroes in front of single digit days and months). Use the pull-down calendar for easy and accurate date entry.

Note:

You may notice that sometimes the cursor seems to jump ahead to the next entry spot (called "fields"). This is because you have reached the end of one field by filling it completely with data. If you don't reach the end by typing information, you **MUST** press Enter or Tab to go to the next entry spot. You will soon get used to this feature and know when to press enter and when you don't need to!

¹ Funeral Directors can enter case information online if your state has an online death certificate registration system, then transfer the info to TerraPro. See our website for details: <http://terradise.net> You will need to download the file edrsstru.dbf on our downloads page.

Choose the place of death by clicking on one of the choices required by your state death certificate. Or, you can use the left or right arrow key to highlight the desired place and then press the space bar to select it. Depending on your choice, the next line will allow you to enter the address of the place of death (if residence) or the facility name (hospital, etc.) If the facility does not exist on your list of facilities, TerraPro will ask if you want to add it.



Note:

When adding new locations to your list, we highly recommend you fill in the address, city, county and state, otherwise these fields will be blank. If you add this information, the next time you select this facility by using the pull-down list the city, county and state will be filled in for you.

The contact is the person who called you about the death (not necessarily the next of kin or informant). **This is optional, unless you want to be able to reach the person with any questions that may arise before the body is transported to the funeral home.**

The informant is the person who will give the funeral director the information about the deceased. If not known at this time, leave blank – it can be added later. If you are serving a family you have served before, you can choose the informant from the pull down list.

The relationship of the informant to the deceased is important. It can help if you know the relationship, because if it is the spouse, it can save entry of that information later on. Use the FAMILY relationship using full words like son, daughter, sister, brother, wife, husband or spouse.

Enter the address and phone number of the informant. If the deceased died at home, and the relationship of the informant is spouse, the address will be automatically copied from the place of death entered above.

The date and time of the arrangements conference can be entered here and is then available on your calendar and on the informant screen.

After you have filled in the information, press the button labeled “Click here when finished”. TerraPro will ask if the informant is also the person responsible for the bill. **If not sure, you might want to answer yes anyway, because you can very easily change the person responsible later.**

Editing Case Information

Once the case has been added to the system, you can finish entering data using the information screens. If the deceased’s name does not show at the upper left, click on the down arrow to open the list of cases. Right clicking will alphabetize the list, Right-clicking again will put in file number order.²

² If your file numbers do not indicate the order in which the cases were entered, use Utilities/Setup to make this list show in reverse death date order instead of file number order.



If the case information screen is not open, use the Edit Existing Case button on the main TerraPro screen menu to open it.

Hint:

If you want to enter the obituary before entering the case data, you can do so by selecting Write Obituary from the main TerraPro screen, or clicking on the Obituary tab of the case information screen.

The case information screen shows information devoted exclusively to this case. For the different aspects of case information, there is a separate tab: *Vital Statistics*, *Disposition* information, *Service* information, *Obituary* and if the deceased was a veteran, tabs for each of the veterans forms. Clicking on a tab will select that tab.

Figure 3 - Vital Statistics Screen

Most of the data entry on this screen is self-explanatory so we will cover only those items needing elaboration.

Last name

Although many states require that the last name be all UPPER CASE on the death certificate, **do NOT enter it using upper case letters**. It will be formatted when you print the death certificate or other forms that need it in UPPER CASE. If you enter it in UPPER CASE, It will show up that way in places that would be inappropriate, like the memorial merchandise.

Birth and Death Dates

When entering dates, you **MUST** enter single digit months and days with a leading zero, so for January 5, 2015 enter 01/05/15. If the year is in the current century, you do not need to enter the full four-digit year. If it is the current year, just enter month and day. The year will fill in.

You can also use the pull-down next to the date to choose a date from a calendar.

Time of Death

Free form – enter in any format

Age (Years, Months, Days)

This will be automatically calculated from the entry of birth and death dates.

Birth State

Use the two character state abbreviation. If in doubt about the abbreviation, use the pull-down list by clicking on the arrow next to the state entry.

Facility Name (or Residence Address)

If the place of death was not at home, you can pull-down a list of previously used facilities. Of course, if you already indicated the facility name or place of residence on the First Call Screen, this information will already be there.



Editing Locations

Use the right-hand mouse button to click on the pull-down list arrow and you will be presented with the Location Editing screen. See details on using this screen in Chapter Two.

TOOL TIPS

Tool Tips are the little help messages that appear as you pass the mouse over a data entry field.

For example, the military honors that a veteran was awarded can be listed in the Honors field on the Vital Statistics Screen (only visible for veterans)

In Armed Services? ☐ Y Military Status ☐ V
Type of Discharge
Burial Benefits Claimed:
☒ Burial Benefits ☒ Flag
☐ Plot Allowance Only ☒ Marker
Honors Rec'd:
Right-Click to Edit Honors Received While in the Military [VETERANS.Honors]

As your mouse passes over this field (without clicking) the tip shows up for a few seconds. Using these “tool tips” can save you time, since you may not need to look in this manual to find an explanation for this data item.



What are those brackets for?

The information shown in brackets, for example, [VETERANS.Honors] tells us what data table and field the information is stored in. Later, when you feel comfortable designing your own forms, you use this information to pinpoint the data item you wish to show on a form. Don't worry if this is geek talk to you! – It is not necessary to know this in order to successfully use TerraPro.

DISPOSITION SCREEN

This screen allows you to enter information about the final resting place of the deceased. You can choose the method of disposition by pulling down the list of acceptable types of disposition. Then you can choose the location of disposition from a list of cemeteries or crematories. This pull-down list works like the one on the Vital Statistics screen, right clicking allows you to edit the list.

The screenshot shows the TerraPro Case Data Disposition Screen for Robert David Probos. The interface includes a sidebar with navigation options like 'Case Information', 'Forms/Reports', 'Office', and 'Links'. The main area is divided into several sections: 'Vital Statistics' (Method of Disposition: Burial, Cemetery: Mt. Washington Cemetery, City: Cincinnati, Ohio, County: Hamilton), 'Service' (Service Date: 11/25/2014, Burial Date: 09/27/2014, Disposition Time: 3:00 PM), 'Cause of Death' (Stopped Breathing, Certifier: Coroner Case), and 'Registrar' (Registrar Name, District #, Date Permit Issued). There are also buttons for 'Case Status', 'Flight Information', 'Floral Tributes', and 'Cemetery Google Map'.

Figure 4 - Disposition Screen

The Method of Disposition will determine the headings of some of the items on this screen. When there is a cremation, the place, city & state and date of inurnment will appear. This disposition of the ashes may also be indicated. If an item seems inappropriate for the type of disposition, ignore it.

Re-interment information can be entered if needed.

Case Status is like your whiteboard – it gives you an overview of all upcoming cases and their status. You can also see the status of upcoming services.

Flight Information can be entered for ship-in or ship-outs. A flight schedule can then be printed which can be given to the family or the attendant transporting the body. See Appendix D for detailed explanation.

Floral Tributes can be recorded with images of the flowers. A list can then be given to the family for acknowledgement purposes. See Appendix D for details.

A map locating the cemetery, with directions, can be shown and printed if the address of the cemetery is known.

The Cause of Death will usually be filled in by the physician who signs the death certificate. It could be omitted here. Clicking the Certifier Data button will allow you to enter or check all the data normally entered by the doctor. Check your funeral home policy for whether or not to fill this in.

The Certifier or physician can be chosen from a list of previously used doctors by clicking on the arrow next to the word Certifier. If the correct doctor is not on the list, right-click the arrow and

you will be asked if you want to add a survivor record for the doctor. Answer yes, then fill in the doctor information. Fill in as much as you know, such as name, address and phone, because this will serve as the Rolodex™ of doctor's names and addresses. When you click on quit/save, TerraPro will ask if you want to save the doctor to the list. Answer Yes, and next time the doctor will be on the list. To edit the doctor/clergy lists, choose Doctor/Clergy Lists from the Main Menu.

Registrar and First Call Contact is optional – this is the person who called the funeral home about the death, and is not necessarily the informant. Since most states use online death registration, the registrar data is stored there.

Embalmers and Funeral Directors and Removal Personnel are setup in advance when your system is setup. To edit them, right-click on the pull-down list arrow. *Remember that the code for a funeral director MUST start with F, embalmers E and Removers R, for them to show up on the pick lists. Then you will assign each staff member a consecutive number (F1, F2, F3 etc).*

SERVICES SCREEN

This screen allows you to enter information about the funeral service, including visitation start and stop times in both data and text format. You can also choose the clergy and record other information about the service.

The screenshot shows the 'Services' screen in the TerraPro Case Data application for the case of Robert David Probos (File number: 2011-501). The 'Service' tab is selected, showing the following information:

- Service date:** 07/02/2015
- Type of Ceremony:** Mass of Christian Burial
- Visitation Dates and Times:**
 - 1. Visitation Wednesday, July 1, 2015 from 4:00 PM-8:00 PM at Holyoke Ch
 - 2. Visitation Thursday, July 2, 2015 from 9:00 AM-11:00 AM at Davis & Pow
 - 3. Sunday, June 8, 2014 from 9:00 AM-11:00 AM at Davis & Powell Funeral
- Service Date:** Thursday, July 2, 2015
- Service Time:** 11:00 AM
- Place of Service:** Trinity Baptist Church
- Clergy:**
 - 1st: Rabbi Bob Alper - Home: 513-444-5555 Work: 513-555-4444
 - 2nd: Rev Horatio Robinson - Home: 513-555-6666 Work: 513-666-5555
 - 3rd: John Johannsen -
- Church Affiliation:** Holyoke Chapel
- Religion:** Baptist
- Deliver Flowers:**
 - ☒ To Funeral Home
 - ☐ To Other Location:
- Date and Time:** 06/07/2014 01:00 PM
- Casket:** Pembroke Cherry - \$4700
- Vault:** Venetian - \$1475
- Comments:** DO NOT RELEASE ANY INFORMATION TO ANYONE EXCEPT INFORMANT. Mother needs help with stairs.
- Hobbies:** Mr. Probos was also interested in his Garden Railway, Nature, and Technology.
- Memorials:**
- Fraternal:** Mr. Probos married his wife on September 15, 1956 and they lived happily until her untimely death on September 16, 1956.
- Checklist:**
 - ☐ Pre-Arranged?
 - ☐ Pre-Paid?
 - ☐ Indigent?
- Source:** Newspaper Ad
- Symbols:** (Three boxes for symbols)

Figure 5 – Services Screen

The Service Date is copied over from the Disposition screen for easy reference. The Type of Service is required information: some forms may require knowing this, or you may wish to do a statistical analysis of the different types of services you provided within a given time frame. Choosing the Type will fill in the Type of Ceremony which indicates Mass of Christian Burial, Funeral Services, or some other type which could show up on a Memorial Folder or Mass Program.

The dates and times of services are shown here, but SHOULD BE EDITED FROM THE EVENTS CALENDAR To bring up the events calendar, right-click any date field (see next page).

Joseph P. Sample Funeral Home Event Calendar

Event Calendar for Robert David Probos

Type of Event:

Location of Event:

Start Date and Time of Event: 09/27/2014 03:00 PM

Ending Time (if appropriate): 04:00 PM

[Add Another Event](#) [Save & Quit](#) [Help](#)

[Click to See Our Calendar](#)

[Add to Google Calendar](#)

[Delete Event](#)

Start Date/Time	End Date/Time	Event Type	Event Description (Click an Event to Edit)	Location
September 26, 2014 4:00 PM	September 26, 2014 5:00 PM	Visitation	Friday, September 26, 2014 from 4:00 PM-5:00 PM at Little Hope Baptist Church	Little Hope Baptist Church 12349 Little Hope Road Cave City, KY
September 27, 2014 1:30 PM	November 25, 2014 2:30 PM	Service	Tuesday, November 25, 2014 from 1:30 PM-2:30 PM at Maple Grove Cemetery	Maple Grove Cemetery 5549 Mechanicsburg-Catawba Road Mechanicsburg, OH
September 27, 2014 3:00 PM	September 27, 2014 4:00 PM	Burial	Saturday, September 27, 2014 from 3:00 PM-4:00 PM at Mt. Washington Cemetery	Mt. Washington Cemetery 2030 Sutton Avenue Cincinnati, OH

The Event Calendar allows you to enter detailed information about each event, such as Visitation, Service, Burial or other events you are responsible for scheduling. Click on the Help button for an overview and tips for using this screen. The clock makes it easy to enter start and stop times for events, after a date has been entered.

Make sure every event has a date, start and stop times, event type and location. The description of the event will be automatically entered for you.

The calendar at the upper left allows you to see your company calendar for scheduling purposes. If you use **Outlook Calendar or Google Calendar**, the event can be automatically copied to that calendar by clicking the button below the calendar icon.

You can edit the list of **types of events** by right-clicking the pull-down arrow, and you can edit **locations** or add new ones by right-clicking the pull-down arrow next to the location field.

Add as many events as needed for this case. When finished, click the Quit button, then click anywhere to update the Services information.

The Church Affiliation and religion are also optional. For Jewish funerals, if “Jewish” or “Judaism” is entered as the religion, additional inputs are visible to indicate choice available:

Rabbi:	<input type="text" value="Rabbi Bob Alper"/> Congregation Herb Alper - 4498 Sundance Highway - Pocono, PA	<input checked="" type="checkbox"/> Shomer?
2nd	<input type="text" value="- - -"/>	<input type="checkbox"/> Tahara?
3rd	<input type="text" value="- - -"/>	<input checked="" type="checkbox"/> Shiva Candle?
Congregation: <input type="text" value="Congregation Herb Alper"/>		<input type="checkbox"/> Tachrihim?
Religion: <input type="text" value="Jewish"/>		<input type="checkbox"/> Tallit?
		Hebrew Deathdate: 21 Tishri, 5772
<input type="button" value="Print Yahrzeit Calendar"/>		

The Hebrew death date is calculated, and a Yahrzeit Calendar may be printed for the next 50 years anniversary dates.

Muslim faith preparation rites information can also be gathered if the religion is indicated as Muslim:

Imam:	<input type="text" value="Imam Muhammad Ali Ben Sarik - Home: N/A Work: N/A"/>	<input type="checkbox"/> Ghusl (Bathing)
2nd	<input type="text" value="(none)"/>	<input checked="" type="checkbox"/> Enshrouding
3rd	<input type="text" value="(none)"/>	<input type="checkbox"/> Janazah Prayer
Mosque:	<input type="text" value="Residence"/>	
Religion:	<input type="text" value="Muslim"/>	

The Casket and Vault will be entered later on the bill, and then will show up here. You can type them in now if desired.

Checklist allows you to check off tasks as they are completed, avoiding duplication of effort, and assuring that nothing is missed. See appendix D for more details on customizing the checklist.

Comments allow you to provide notes about the case that others may need to properly serve the family. Right-click on comments, memorials or fraternal fields to enlarge them to full screen size for editing.

Memorials is used in case you want a separate place to record the wishes of the family for contributions. If you right-click on this field, it will enlarge to a text editing box. Pressing CTRL-M while on that box will bring up the list of Charities (which can then be edited) and choosing one will type the appropriate language into the text.

Fraternal is used to record fraternal organizations the deceased may have belonged to. If these are recorded in the Obituary, there is no need to re-state them here, unless you have a form that requires them to be separated. This field could also be used for custom information – ask **TerraPro** personnel how to use it for that.

Hobbies also can be used to record interests and other information about the deceased’s life.

Symbols can be indicated, and used on memorial merchandise or website entries.

Obituaries and death notices vary widely in format from town to town. Larger city newspapers typically charge for death notices, but publish obituaries (longer stories usually with a picture and having general public interest) as news items. Smaller town newspapers usually do not charge for obituaries, and the line between a death notice and an obituary is less distinct.

Since the obituary is one of the first items needing completion, we have given you complete freedom in the way you create it. You can type it yourself, composing it from the information gleaned from the family arrangement conference. You can also have TerraPro start to write it for you, based on the information you have entered. The more information you enter, the more complete will be the writing of the automatic obituary. Because of newspaper deadlines, you may not have the luxury of being able to enter all information first, so choose the way that works best for each case.

Let's suppose you have entered all the case information and wish to use the automatic obituary writer: Place the cursor on the empty Obituary text screen, and hold down the CTRL key and then tap the letter O (for Obit, naturally!) In a few seconds, TerraPro will compose the information in a narrative style and place it on the screen for editing. If you are not happy with what is presented, just edit it, or erase it and start over.

Some of the choices shown are optional add-ons. If you have an internet website, you can automatically add this obit and picture to websites we host or partner with.

You can also email the obit and picture directly from this screen to the newspaper or other email recipient.

Optional: TerraPro can link this data to ASD (Answering Service for Directors), and our own Votive Online TerraPro to save you precious minutes re-typing data.

Scanning pictures has never been easier with our built-in EZ Twain™ scanning utility. Just place the picture on the scanner, push this button, crop as necessary and accept the picture. It will automatically be placed in the TerraPro Images /People folder so that all your network users can access the picture.

You can also Double-Click the filename box under the picture to assign an already scanned or emailed picture.

Figure 6 – Obituary

TerraPro allows you to store three different obituaries for each case. Click on the Obit1, Obit2 or Family buttons at the upper left, and you can create a long obit, a short death notice or a family listing quickly. When you choose to email the obit to the newspaper, first click Obit1, Obit2 or Family to select the obit you will be emailing.

The photo you scan can be edited to apply frames, fuzzy borders, color correction or hundreds of other artistic options by using a separate program such as Adobe Photoshop. A **free program** we recommend is called **PhotoScape**, and is available by clicking the button to the right of the photo on the obituary page. Once installed, clicking the Edit Photo button will load **PhotoScape** with the selected picture ready to edit. If desired, it can then be saved as a different name to preserve the original picture.

If you want to embed a link to the Video Tribute, you can copy and paste the link on this screen (upper left) or if you use a service, you may be given a tribute ID to enter. Call us for individual help on this topic.

There is a shortcut to the Survivors Screen here in case you need to check some information or enter more survivors.

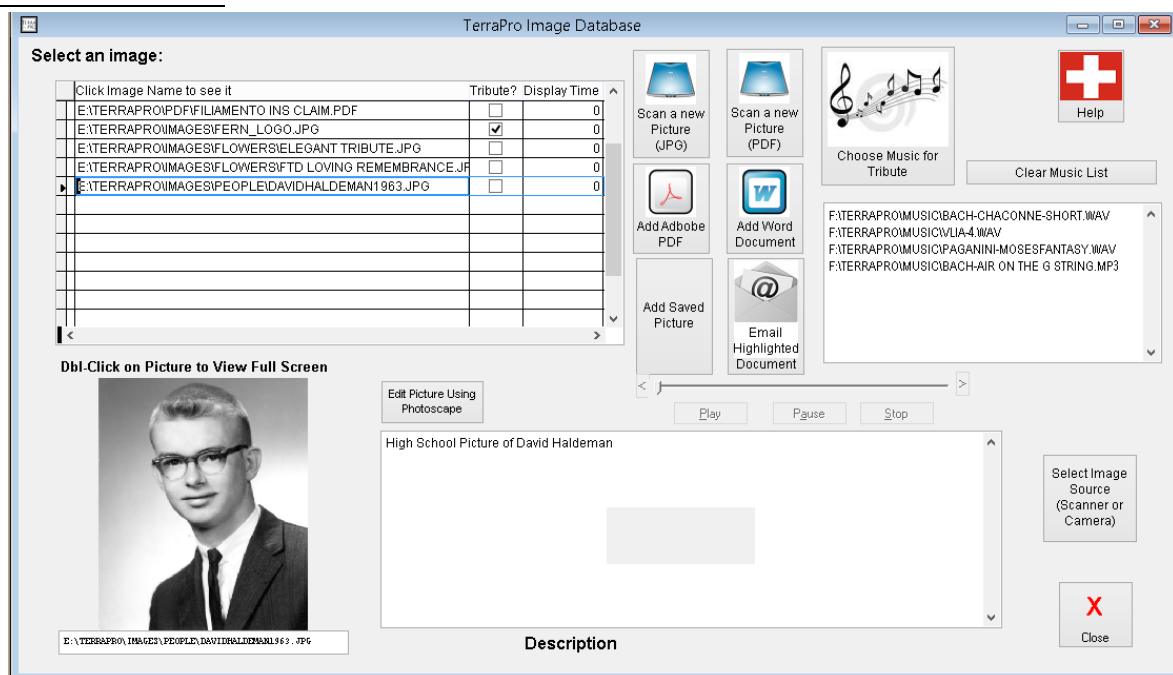
You can adjust how the obituary is written by clicking on the Modify Obituary Format button. See Appendix D for information on how to use the “*Modify Obituary Format*” button.

The Print/Fax button will let you print or fax the death notice in a customized format. See TerraPro personnel for advice on how to customize this form, or read Chapter 10 if you would like to do it yourself.

Count Words gives you a word count and lets you estimate the cost of the death notice based on the number of words per line and the line charge from your local paper. This is an estimate only, and may not reflect the actual charges incurred.

TERRAPRO DOCUMENT MANAGEMENT

Manage Other Images and Documents is the door to a complete image and document tracking system for a particular case. It can be used to scan documents related to the case, such as military or legal documents which normally would be copied and placed in a file.



It is also the place where a slide-show tribute can be created for families who decline a DVD copy of a Tribute Video. Your large screen TV or monitor can show this slide show, broadcast wirelessly using a VGA broadcaster and receiver available from ioGear™ for around \$300. Optionally, a laptop or other networked computer near the big screen can connect directly to it. The tribute feature is an option, but is included to try out in all versions of TerraPro. Music can also be added to the tribute. The music files should be in mp3 format, and are placed in the TerraPro\Music folder.

Any PDF document can be signed and emailed from this screen.

BURIAL
BENEFITS
SCREEN

These screens are only accessible if you have indicated they are needed on the first screen (Vital Statistics). See page 8 for a close-up of the bottom of this screen showing how to select these forms. Unless the deceased was a veteran, they will not be on the screen.

TerraPro Case Data

Filenumber: 2014-108 **Robert David Probos**

Vital Statistics | **Disposition** | **Service** | **Obituary** | **Benefits I** | **Benefits- II-IV** | **Flag** | **Marker** | **Marker - II**

Department of Veterans Affairs
VA FORM 21P-530
JUN 2014

APPLICATION FOR BURIAL BENEFITS
(Under 38 U.S.C. Chapter 23)

1. FIRST, MIDDLE, LAST NAME OF DECEASED VETERAN: Robert David Probos

2. SOCIAL SECURITY NUMBER OF VETERAN: 123-45-6789

3. VA FILE: [Blank]

8. RELATIONSHIP OF CLAIMANT TO DECEASED VETERAN: Parent

4. FIRST, MIDDLE, LAST NAME OF CLAIMANT: [Blank]

5. TELEPHONE NUMBER(S) (Include Area Code): A. DAYTIME [Blank] B. EVENING [Blank]

6. E-MAIL ADDRESS OF CLAIMANT: [Blank]

7. MAILING ADDRESS OF CLAIMANT (Number and street or rural route, city or PO., State and ZIP): [Blank]

PART I - INFORMATION REGARDING VETERAN

9A. DATE OF BIRTH: 01/26/1945

9B. PLACE OF BIRTH: Mt. Gilead OH

10A. DATE OF DEATH: 09/22/2014

10B. PLACE OF DEATH: Cincinnati OH

10C. DATE OF BURIAL: 09/27/2014

10D. WHERE DID DEATH OCCUR?: Somewhere in Iraq

SERVICE INFORMATION (The following information should be furnished for the periods of the VETERAN'S ACTIVE SERVICE)

11A. ENTERED SERVICE		11B. SERVICE NUMBER	11C. SEPARATED FROM SERVICE		11D. GRADE, RANK OR RATING, ORGANIZATION AND BRANCH OF SERVICE
DATE	PLACE		DATE	PLACE	
01/08/1942	San Francisco	879283992	01/07/1946	San Francisco	2nd Lt.
05/26/1952	Seattle	29293992	05/26/1954	San Diego	Captain
02/08/1968	San Diego	23908929	02/07/1972	Milwaukee	General

12. IF VETERAN SERVED UNDER NAME OTHER THAN THAT SHOWN IN ITEM 1, GIVE FULL NAME AND SERVICE RENDERED UNDER THAT NAME: Pops

CLICK BUTTON BELOW TO VIEW OFFICIAL VA FORM ON VA WEBSITE

View VA Form

File Online

Figure 7 - Burial Benefits Screen I

This screen is a close approximation of the actual VA form 21p-530 which is used to claim burial benefits from the Veterans Administration. Information you previously entered is automatically transferred to the veterans' forms from the case data previously entered. Anything that is missing can be filled in, or boxes checked as appropriate.

Claimant information can be typed in, or one of the survivors can be made the claimant by giving them a code "CF" in their other relationships. You can right-click to edit the claimant.

VA FORMS

U S :

Whenever you see the above button, you can double-click it to bring up the actual VA form in Adobe Acrobat™ format from the VA website. If you do not have the Adobe Acrobat Reader, it is readily available for free download from Adobe's website, www.adobe.com.

Having an original, blank copy of each of the veteran's forms right here in TerraPro is an easy and convenient way of using it for reference, or to give to the family.

BURIAL
BENEFITS II

This screen allows you to enter the actual amounts due the claimant for parts II, III and IV.. See the actual VA instructions for details.

TerraPro Case Data

File number: 2014-108 **Robert David Probos**

Vital Statistics	Disposition	Service	Obituary	Benefits I	Benefits II-IV	Flag	Marker	Marker - II
-------------------------	--------------------	----------------	-----------------	-------------------	-----------------------	-------------	---------------	--------------------

PART II - CLAIM FOR BURIAL ALLOWANCE

<p>13. BENEFITS REQUESTED</p> <p><input type="checkbox"/> NON-SERVICE-CONNECTED DEATH</p> <p><input checked="" type="checkbox"/> SERVICE-CONNECTED DEATH</p>	<p>14. IF DECEASED VETERAN'S SPOUSE, DID YOU PREVIOUSLY RECEIVE A VA BURIAL ALLOWANCE?</p> <p><input type="checkbox"/> YES <input type="checkbox"/> NO</p>
--	--

15A. DID YOU INCUR EXPENSES FOR THE VETERAN'S BURIAL OR INTERMENT?

☐ YES ☐ NO

15B. ARE YOU SEEKING BURIAL BENEFITS FOR A VETERAN'S NON-SERVICE-CONNECTED DEATH OCCURRING AT A VA MEDICAL CENTER, NURSING HOME WITH A VA CONTRACT, OR OTHER VA FACILITY?

☒ YES ☐ NO (If "yes", provide actual burial cost) \$ 2,650.00

PART III - CLAIM FOR PLOT OR INTERMENT ALLOWANCE

<p>17. WAS VETERAN BURIED IN A NATIONAL CEMETERY OR CEMETERY OWNED BY THE FEDERAL GOVERNMENT?</p> <p><input checked="" type="checkbox"/> YES <input type="checkbox"/> NO</p>	<p>18A. DID A FEDERAL/STATE GOVERNMENT OR THE VETERAN'S EMPLOYER CONTRIBUTE TO THE BURIAL?</p> <p><input checked="" type="checkbox"/> YES <input checked="" type="checkbox"/> NO</p>	<p>18B. AMOUNT OF GOVERNMENT OR EMPLOYER CONTRIBUTION</p> <p style="text-align: right;">\$ 100.00</p>
--	--	---

PART IV - CLAIM FOR TRANSPORTATION REIMBURSEMENT

19. EXPENSES INCURRED FOR THE TRANSPORTATION OF THE VETERAN'S REMAINS FROM THE PLACE OF DEATH TO THE FINAL RESTING PLACE (Attach itemized receipts)

\$ 150.00

VA FORM **21-530**

Figure 8 - Burial Benefits II

You can download the latest versions of all veterans forms at the VA website, <http://www.va.gov>

Keep in mind that the Benefits I and II print on the front and back of the VA Application for Burial Benefits Form 21p-530. You will print these forms from the Print Forms dialogue. If you set your printer to duplex printing, the form will print front and back on the same sheet of paper.

The most commonly used Veteran's Benefit is a US Flag for draping the casket and presentation to the survivors. Make sure the survivor that is to receive the flag has an "FL" code in their other relationships, then proceed to the flag form:

TerraPro Case Data

File number: 2014-108 **Robert David Probos**

Vital Statistics **Disposition** **Service** **Obituary** **Benefits I** **Benefits- II-IV** **Flag** **Marker** **Marker - II**

Department of Veterans Affairs **APPLICATION FOR UNITED STATES FLAG FOR BURIAL PURPOSES**

1. LAST NAME, FIRST NAME, MIDDLE NAME OF DECEASED **Probos Robert David** [View VA Form](#)

2. BRANCH OF SERVICE (Check box)
☒ ARMY ☐ NAVY ☐ AIR FORCE
☐ MARINE CORPS ☐ COAST GUARD ☐ OTHER (Specify) **Army**

3. VETERAN'S SERVICE (Check box)
☐ SPANISH AMERICAN ☐ WWI ☐ WWII ☐ KOREAN CONFLICT
☐ AFTER 1-31-55 ☒ VIETNAM ERA
☐ OTHER (Specify)

4. CONDITION UNDER WHICH VETERAN WAS RELEASED FROM SERVICE (Check box) (See Item 2, Instructions on Reverse)
☒ A. VETERAN OF A WAR, MEXICAN BORDER SERVICE, OR OF SERVICE AFTER 1-31-45, DISCHARGED OR RELEASED FROM ACTIVE DUTY UNDER CONDITIONS OTHER THAN DISHONORABLE
☐ B. DISCHARGED FROM OR RELEASED FROM ACTIVE DUTY IN U.S. ARMED FORCES UNDER CONDITIONS OTHER THAN DISHONORABLE, AFTER HAVING SERVED AT LEAST ONE
☐ C. BY DEATH IN ACTIVE SERVICE AFTER MAY 27, 1941, AND FLAG NOT FURNISHED BY SERVICE DEPARTMENT
☐ D. SEPARATED FROM PHILIPPINE MILITARY FORCES, UNDER CONDITIONS OTHER THAN DISHONORABLE, AFTER SERVING WITH THE UNITED STATES IN SUCH FORCES UNDER THE PRESIDENT'S ORDER OF JULY 26, 1941, AND DIED ON OR AFTER APRIL 25, 1951

5. NAME OF PERSON ENTITLED TO RECEIVE FLAG **Thelma Kay Probst**

6. ADDRESS OF PERSON ENTITLED TO RECEIVE FLAG **9894 Garaga Lane Wazoo, IA 78747**

7. RELATIONSHIP TO DECEASED **SP** Spouse

PERSONAL DATA OF DECEASED (To be completed if possible)

8. VA FILE NUMBER

9. SOCIAL SECURITY NUMBER **123-45-6789**

11. DATE OF ENLISTMENT **01/08/1942**

12. DATE OF DISCHARGE **01/07/1946**

7A. DATE OF BIRTH **01/26/1945**

10. SERVICE SERIAL NUMBER **879283992**

8A. DATE OF DEATH **09/27/2014**

15. DATE OF BURIAL **09/27/2014**

16. PLACE OF BURIAL (Name of cemetery, city, state) **Cincinnati, Ohio**

17. REMARKS

19. ADDRESS OF APPLICANT ☒ **Funeral Director**
Joseph P. Sample Funeral Home Cincinnati, OH 4523045230

Figure 9 - VA Flag Form

You will need to indicate the relationship of the recipient to the deceased. If you have entered the FL code as Other Relationship on that survivor screen, the address will fill in from that record.

HINT: When entering informant or other close relatives, add the FL code at that time to save time on this screen.

MARKER
SCREEN I

Free Government Markers are available from the VA. Filling out this form will let you apply for one:

TerraPro Case Data

File number: 2014-108 **Robert David Probos**

Vital Statistics	Disposition	Service	Obituary	Benefits I	Benefits II-IV	Flag	Marker	Marker - II
Department of Veterans Affairs View VA Form Online		IMPORTANT: Please read the General Information Sheet before completing this form. Type or print clearly all information except for signatures. Illegible printing could result in an error in the processing of the form or marker or delivery. BLOCKS OUTLINED IN BOLD are optional inscription items. Unless indicated otherwise, all other blocks must be completed.						
MILITARY DISCHARGE DOCUMENTS OR RELATED SERVICE INFORMATION IS REQUIRED.								
2. NAME OF DECEASED TO BE INSCRIBED ON HEADSTONE OR MARKER (NO NICKNAMES OR TITLES PERMITTED) FIRST (or Initial) Robert MIDDLE (Or Initial) David LAST Probos						3. GRAVE IS: <input type="checkbox"/> CURRENTLY MARKED		
VETERAN'S SERVICE AND IDENTIFYING INFORMATION (Use numbers only, e.g. 05-15-41)								
4. SOCIAL SECURITY NO. 123-45-6789 3B. SERVICE NO. 879283992 4A. DATE OF BIRTH 1945 4B. DATE OF DEATH 2014			PERIODS OF ACTIVE MILITARY DUTY 6A. DATE(S) ENTERED 1st Service Entry Date: 01/08/1942 2nd Service Entry Date: 05/26/1952 6B. DATE(S) SEPARATED 1st Service Exit Date: 01/07/1946 2nd Service Exit Date: 05/26/1954					
7. HIGHEST RANK (No pay grades) []			8. BRANCH OF SERVICE <input checked="" type="radio"/> ARMY <input type="radio"/> NAVY <input type="radio"/> MARINE CORPS <input type="radio"/> COAST GUARD <input type="radio"/> AIR FORCE <input type="radio"/> ARMY AIR FORCES <input type="radio"/> MERCHANT MARINE <input type="radio"/> OTHER (Specify)					
9. VALOR OR PURPLE HEART (Documentation must be provided) <input type="checkbox"/> Congres. Medal /Honor <input type="checkbox"/> Distinguished Svc Cross <input type="checkbox"/> Bronze Star <input type="checkbox"/> Navy Cross <input type="checkbox"/> Air Force Cross <input type="checkbox"/> Silver Star <input type="checkbox"/> Purple Heart			10. WAR (Check applicable box(es)) <input type="radio"/> WWI <input type="radio"/> WWII <input type="radio"/> KOREA <input checked="" type="radio"/> VIETNAM <input type="radio"/> PERSIAN GULF <input type="radio"/> OTHER (Specify)					
11. TYPE OF HEADSTONE OR MARKER REQUESTED <input type="checkbox"/> FLAT BRONZE <input type="checkbox"/> FLAT GRANITE <input type="checkbox"/> UPRIGHT MARBLE <input type="checkbox"/> FLAT MARBLE <input type="checkbox"/> BRONZE NICHE <input type="checkbox"/> UPRIGHT GRANITE			12. DESIRED RELIGIOUS EMBLEM <input checked="" type="checkbox"/> Christian Cross EMBLEM NUMBER: 01 OPTIONAL: MEDALLION SIZE (FORM VA40-1330M) <input type="radio"/> 5 inch <input type="radio"/> 3 inch <input type="radio"/> 1.5 inch View VA Medallion Form Online					
VA FORM 40-1330								

Figure 10 - VA Marker Application I

Again, any information entered on any veteran's form carries to the other forms. Fill in data as needed, check any appropriate boxes and continue to the second Marker Screen:

TerraPro Case Data

Filenumber: 2014-108 Robert David Probos

Vital Statistics Disposition Service Obituary Benefits I Benefits- II-IV Flag Marker Marker - II

Department of Veterans Affairs APPLICATION FOR STANDARD GOVERNMENT HEADSTONE OR MARKER (Con't)

16. ARE YOU ☒ Next of Kin
☐ AUTHORIZED REPRESENTATIVE ON BEHALF OF DECEDENT (Include Written Authorization)
☐ AUTHORIZED REPRESENTATIVE ON BEHALF OF NEXT OF KIN (Include Written Authorization)

13A. NAME AND ADDRESS OF APPLICANT
Ivan Henry Probos
12576 Caledonia Northern Road
Caledonia, OH 43314

13B. DAYTIME PHONE
419-845-2141

14. Email Address (Optional)

19. NAME AND ADDRESS OF BUSINESS (CONSIGNEE) WHO WILL ACCEPT PREPAID DELIVERY
(No., street, city, State and ZIP Code)
P.O. BOX IS NOT ACCEPTABLE
Ivan Henry Probos
12576 Caledonia Northern Road
Caledonia, OH 43314

20. DAYTIME TELEPHONE NO.
419-845-2141
(Include Area Code)

21. NAME AND ADDRESS OF CEMETERY
Mt. Washington Cemetery
2030 Sutton Avenue
Cincinnati, Ohio 45230
Right-Click to Edit Cemetery Information

27. REMARKS (Available optional inscription space may be limited by type of marker)

28. CHECK BOX BELOW IF REMAINS ARE NOT BURIED AND EXPLAIN IN BLOCK 27
(e.g. lost at sea, remains scattered, etc.)
☐ REMAINS NOT BURIED

STATE VETERAN'S CEMETERY AND GRAVE LOCATION (Cemetery Use Only)

29A. SECTION / GRAVE
GARDEN2 1

VA FORM 40-1330 APPLICATION FOR STANDARD GOVERNMENT HEADSTONE OR MARKER

Figure 11 - VA Marker Application II

Once you have learned how each of the screens in this chapter works, you are well on your way to mastering TerraPro. The remaining chapters will help you learn to enter survivors, print forms and cards, modify your forms and learn the inside scoop about TerraPro.

NOTES :

Using the Right-hand Mouse Button

Your mouse has two or more buttons. You paid for them, why not use them all?

If you've read the previous chapter, you probably are getting the idea about the right-hand mouse button. If you press it at certain spots in TerraPro, it gives you access to editing information related to the spot you pressed it. For example, right-clicking on the informant's name on the Vital Statistics screen will bring up the Survivor's screen, where you can change information, track After Care, or write letters.

Let's explore other uses for this button!

First of all, when you pass the mouse over certain parts of the data entry screens, TerraPro will provide tips about how to enter data, or let you know you can right-click to "drill-down" to more information.



Let's do it!

From the Vital Statistics Screen, move the mouse to the name of the informant. Click the right-hand mouse button. The survivors (or people) screen will pop up. For now, close it using the red X or the Save and Quit button.

DIFFERENT CLICKS FOR DIFFERENT TRICKS

Another way to use the right-hand mouse button is to maintain your lists which pop-up from the pull-down buttons. For example, the cemetery locations pull-down button on the Disposition tab allows you to make changes to the details about each cemetery.

On the Service tab, you can edit Places of service by right clicking on the pull-down for place of service, and edit the list of churches by right clicking on the pull-down for churches. In fact, at any point where prompted by the tips, you can right click to do more with the data. If you happen to right click where not prompted, no harm is done.

Editing Locations

Now that you know how to get to the locations editing screen by right-clicking on certain pull-down lists, let's find out how to make changes to our locations list.



What are Locations?

Locations are defined as facilities where death occurred, churches and other places for services to be held, cemeteries or crematories and so on.



Let's do it!

As with other editing in TerraPro, you get behind the scenes for data lists by right-clicking on the appropriate pull-down list. If not already editing a case, click Edit Current Case (1) on the Main TerraPro Screen menu. Click on the Service tab (2), then right-click on the Place of Service Arrow (3):

The screenshot shows the TerraPro Case Data interface for a case named "Robert David Probos" with File number 2014-108. The interface is divided into several sections:

- Left Sidebar:** Contains a "Case Information" menu with options like "Add New Case", "Edit Survivors", "Write Qbit", "Edit Current Case" (annotated with 1), "Arrangements", "Edit Bill", "Crematory", "Forms, Reports", "Forms / Reports", "Card Shop", "Envelopes-Labels", "Office", "Checklist", "Doctors/Clergy Lists", "Price Lists", "Monthly Statements", "Cash Receipts", "Utilities", "Links", "Our Website", "TerraPro Website", "Rescue wikia", "Check for Update", "Quit", "Marquee", "Tribute", and "Show Comments".
- Top Tabs:** "Vital Statistics", "Disposition", "Service" (annotated with 2), "Obituary", "Benefits I", "Benefits II-IV", "Flag", "Marker", and "Marker II".
- Service Tab Content:**
 - Service date:** 09/27/2014
 - Type of Ceremony:** Celebration of Life
 - Visitation Dates and Times (Right Click to Edit):** A list of dates and times for visitations.
 - Service Date:** Saturday, September 27, 2014
 - Service Time:** 1:30 PM
 - Place of Service:** A pull-down menu (annotated with 3) currently showing "Maple Grove Cemetery".
 - Imam:** Imam Muhammad Ali Ben Sarki - Home: N/A Work: N/A
 - 2nd:** (none)
 - 3rd:** (none)
 - Mosque:** Residence
 - Religion:** Muslim
 - Deliver Flowers:** ☒ To Funeral Home, ☐ To Other Location
 - Date and Time:** 09/26/2014 10:00 AM
 - Casket:** "Bristol" Poplar - \$4735
 - Vault:** Wilbert STAINLESS STEEL TRIUNE VETE
 - Comments:** Flowers Return to Family. Templeton to download music and bring CD player for graveside
 - Hobbies:** Mr. Probos was also interested in his Garden Railway, Nature, and Technology
 - Memorials:** Memorial Contributions may be made to Hospice Foundation of America, 777 17th Street Suite 401 Miami Beach, FL 33139; Good Samaritan Foundation Inc.
 - Fraternal:** Altrusa Club of Cincinnati; Sons of Union Veterans of the Civil War
 - Checklist:** ☒ PreNeed?, ☐ PrePaid?, ☐ Indigent?
 - Source:** Newspaper Ad
 - Symbols:** A cross symbol and a "Clear Symbols" button.

Figure 12 - Getting to the locations editing screen via right-click on a location pull-down list

Locations

Use mouse to select a location (or start typing location name to select):

Kemper Home Companies	Home Service Insurance	St. Louis
Liberty Life Insurance Company	PO Box 19038	Greenville
Liberty National Life Insurance Company	Insurance Services Div	McKinney
Life of Georgia		
Lifeplan Australia Friendly Society Ltd		
Lilydale Lawn Cemetery	120 Victoria Rd	Melbourne
Little Hope Baptist Church	12349 Little Hope Road	Cave City
Little Hope Cemetery	Main Road	Hope
Location		
Magazine Ad		
Make a Wish Foundation	Southern Ohio Office	Mason
Maple Grove Cemetery	9549 Mechanicsburg-Cat	Mechanicsburg
Marion Cemetery	1800 Delaware Avenue	Marion
Melbourne General Cemetery		
Metropolitan Life Insurance Company		
Miles Davis Memorial Hospital	2891 Louis Armstrong Blvd	Cincinnati
Monumental Life Insurance Company	2 East Chase Street	Baltimore
Mornington Cemetery		
Mount Carmel East Hospital		

Click on a checkbox below to filter list to show:

- ☐ Cemeteries
- ☐ Crematories
- ☐ Churches
- ☐ Fraternal Organizations
- ☐ Insurance Companies
- ☐ Institutions
- ☐ Memorials
- ☐ Places
- ☐ Registrars
- ☐ Sources

Buttons: Quit, Labels, Edit Selected Location, Add Location

Figure 13 - Location Editing Main Screen

When first entering the locations editing screen, the list shows ALL locations. If you want to edit just Places of Service, check the box next to the word Places by clicking on it. Now you see just the locations coded as PLACE:

Locations

Use mouse to select a location (or start typing location name to select):

Disaster		Cincinnati
Freeman Funeral Service, Inc.		Clay
Freshwater, McDonald & Vernon Funeral		North Lewis
Greater Cincinnati Airport	2939 Terminal Dr	Hebron
Holyoke Chapel	1536 Whetstone River Rd	Caledonia
JC Battle and Sons	543 Rockdale Avenue	Cincinnati
Joseph P. Sample Funeral Home & Crema		Clay
Joseph P. Sample Funeral Home, Inc.	6404 Coffey Street	Cincinnati
Joseph P. Sample Pet Cremation		Cincinnati
Joseph Sample Monuments		Cincinnati
Little Hope Baptist Church	12349 Little Hope Road	Cave City
Our Lord Christ the King Church		
Residence		
Skillman, McDonald & Vernon Funeral Ho		Mechanicsburg
St. Vincent Ferrer Church		
T. P. White & Sons Funeral Home, Inc.	2050 Beechmont Avenue	Cincinnati
T. P. White & Sons, Inc.		Columbus
Templeton Family Funerals		Van Wert
Vernon Funeral Home		Urbana

Click on a checkbox below to filter list to show:

- ☐ Cemeteries
- ☐ Crematories
- ☐ Churches
- ☐ Fraternal Organizations
- ☐ Insurance Companies
- ☐ Institutions
- ☐ Memorials
- ☒ Places
- ☐ Registrars
- ☐ Sources

Buttons: Quit, Labels, Edit Selected Location, Add Location

Figure 14 - Locations Editing Main Screen Filtered for Places only

You might see a lot of churches listed. These are the entries coded as Place of Service when the church is where the service is held. These same churches might appear on the Churches list separately, so be sure you make any changes under both entries.

To edit the data for any location, highlight the desired location by single clicking on it, or find it in the list by starting to type its name. As you type, the list will move to the letters typed. (If you are a slow typist, the list may jump around. Try typing the first two letters quickly to get near the right entry, then use the arrow keys to move up or down to the right entry.) Click on Edit, and the editing screen will appear:

The screenshot shows a window titled "Editing Locations" with a standard Windows interface (minimize, maximize, close buttons). The window contains a form with the following fields and controls:

- Title:** "Editing Locations" in large bold text.
- Map - Click to Show or Close:** A button.
- Type:** A pull-down menu currently set to "CEMETERY".
- Location:** Text field containing "Maple Grove Cemetery".
- Address1:** Text field containing "5549 Mechanicsburg-Catawba Road".
- Address2:** Empty text field.
- City:** Text field containing "Mechanicsburg".
- Inside City Limits?:** A checkbox.
- Twp:** Empty text field.
- County:** Text field containing "Champagne".
- State:** Text field containing "OH".
- Zip:** Text field containing "43044".
- District:** A pull-down menu.
- <-- Choose Claim Form Report Layout:** A button.
- Contact:** Empty text field.
- Phone:** Text field containing "- -".
- FAX:** Text field containing "- -".
- Cellphone:** Text field containing "- -".
- Email:** Empty text field.
- Notes:** A large text area with a vertical scrollbar.
- Fee:** Empty text field.
- Buttons:** "Print Map" and "Google Map" are located to the right of the address fields.
- Footer Buttons:** A row of buttons: "Top", "Prev", "Next", "Bottom", "Find", "Print", "Save", "Revert", "Delete", "Exit".

Figure 15 - Editing details about locations

Make the changes as needed. Notice the upper right part of this screen has a pull-down list that allows you to decide which pull-down list this location will appear on. Right now, it says PLACE, but you could change that to another list. Click on Save to save your changes, or Revert if you don't want to save your changes.

Note: You may see the same location on your list two or three times. This is because it is there under PLACE and CHURCH. That way, when you pull-down a list at the Churches selection, it will be listed as well as under the PLACE of service. If it listed under PLACE twice, then one may safely be deleted.

You can print labels for all locations (memorials, places of service, cemeteries, institutions and churches) from the Figure 15 screen also. Just filter for the type of location by clicking one of the filter check boxes, then click on Labels – you can preview them first to assure all addresses are complete.

Figure 16 - Editing Screen after saving

After saving, you have many choices:

Top – Go to the first entry alphabetically.

Prev – Go to the entry alphabetically before the one displayed.

Next – Go to the entry alphabetically after the one displayed.

Bottom – Go the the last entry alphabetically.

Find – Brings up a dialogue box that lets you search for the location by any of the fields listed.

Print – Print a Rolodex™ Card for this entry.

Add – Make a new entry (in any category – Place, Church, Cemetery, etc)

Edit – Make changes to this entry

Delete – Delete this entry (you will be prompted to confirm delete)

Exit – Leave the editing screen, return to the locations main editing screen.

Editing Survivors

TerraPro uses the term “Survivors” rather loosely. It refers really to “People”, living or dead, related to the deceased or not, but sharing the common property of being a part of the case information for this deceased.

You can get to the survivor-editing screen by right clicking on the informant’s name, or by clicking Edit Survivors on the Obituary screen. You can also get there by right clicking on the pull-down arrow for the clergy or doctor pull-down list or the father or mother’s name. In other words, wherever a survivor is referenced on the main editing screens, you can “drill-down” to the survivor-editing screen by using the right hand mouse button.

The screenshot shows the 'Survivors File for Robert David Probos - Case # 2011-501- Died June 30, 2015'. The interface has a purple header and a white main area. At the top, there's a dropdown for 'Foolery, Georgia' and buttons for '<--CHOOSE ANOTHER PERSON' and 'Refresh List'. Below this is a tabbed interface with 'Spouse Information' selected. The form contains various fields: 'Relationship to Deceased' (SP), 'Other Relationships (use 2 letter codes)' (IN-PR- - - - -), 'Insurance Policies', 'Title' (dropdown), 'First' (Georgia), 'Middle' (May), 'Last' (Foolery), 'AKA', 'Sex', 'Salutation', 'Date Married' (//), 'Marriage Info' (memo), 'Maillist Codes' (dropdown), 'List with Survivors' and 'Deceased' checkboxes, 'P.O. Box/Apt', 'Street & #' (1076 East Church St), 'City' (Marion), 'OH' state dropdown, 'ZIP' (43302), 'County', 'Twp', 'Inside City?' checkbox, 'Arrangements Conference Date/Time' (10/04/2012 12:00 AM), 'Evening or Home Phone' (740-383-9657), 'Daytime or Work Phone', 'FAX', 'Cell Phone', 'E-mail', 'Birthdate' (//), and 'SSN'. At the bottom, there are buttons for 'Browse/Add', 'New', 'Delete', 'Google Map', 'Previous', 'Next', and 'Save & Quit' (with a red X icon). A note at the bottom says 'When adding NEW records, fill in City, State & ZIP Automatically'.

Figure 17 - Survivor's Screen

An important part of this screen has to do with defining the relationship(s) of the survivor to the deceased. TerraPro uses two letter codes to define relations. Most of the codes use the first two letters of the relationship. For example, FA-Father, MO-Mother, DA-Daughter, SO-Son, UN-Uncle, AU-Aunt, etc. Where not obvious what the relationship is, use the pull-down list to choose. If the relationship is not listed, use the right hand mouse button to edit the list. Once in the list, press CTRL-Y (hold down the CTRL key and then tap the Y key). Enter the new relationship and code, and then under male and female, enter the relation if the deceased is male or female.

The other relationships this person has are also important. It is possible for one person to have many relationships to the deceased and many duties to perform. For example, the Spouse could also be the informant, person responsible for the bill, flag recipient, marker claimant, etc. In order for TerraPro to know who has these responsibilities, you MUST enter the other relationship codes into the other relations' field. There is room for up to seven codes, each separated by a space. If your cursor is not properly placed it is possible that using the pull-down list will cause a code to be

divided over the preset spaces in the field. Make sure each relationship has two characters. If entering codes manually, the space is automatically entered for you, do not use the space bar in that field.

QUICK ENTRY
OF FAMILY
MEMBERS

The button labeled Browse/Add can be used for quick, spreadsheet-style entry of family members. It will be necessary for you to know the family relationship codes before you start entering family members, as there is no pull-down available during entry. You should also remember to mark the members as family by putting a 'T' in the "List with Survivors?" column. Later, when creating an Obituary or Family List, CTRL-L will build a list of relations, names and cities for those survivors marked as family members.

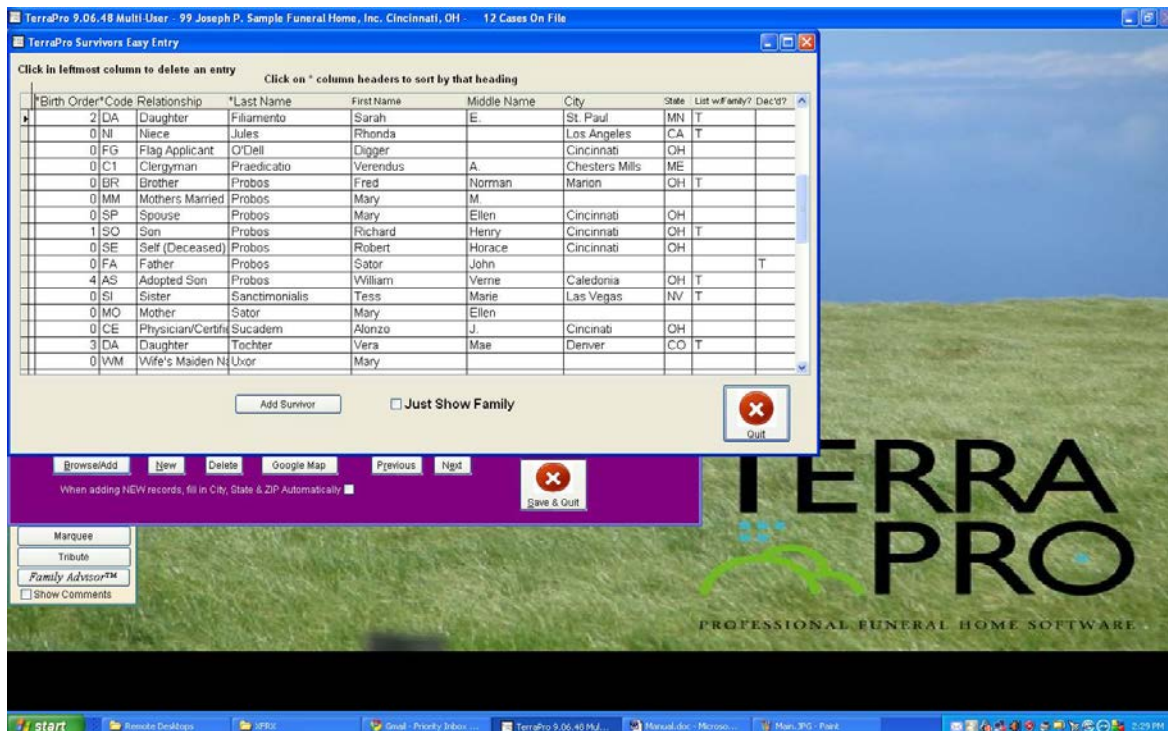


Figure 18 - Browse/Add Survivors Quick Family Member Entry Screen

AFTERCARE LETTERS

See Chapter 6, AfterCare, for details about using the built-in Post Service Follow-up system in TerraPro.

TEXTING

If you enter a cell phone number for any survivor, you can text directly from TerraPro and hear back from them. This gives you a record within the case file of any texts sent to the survivor.

NOTES:

[illegible]

Printing Forms

After data is entered that appears on a form, you can print the form. This chapter tells how to print forms.

From the main TerraPro screen, select Forms by clicking on the button labeled forms.

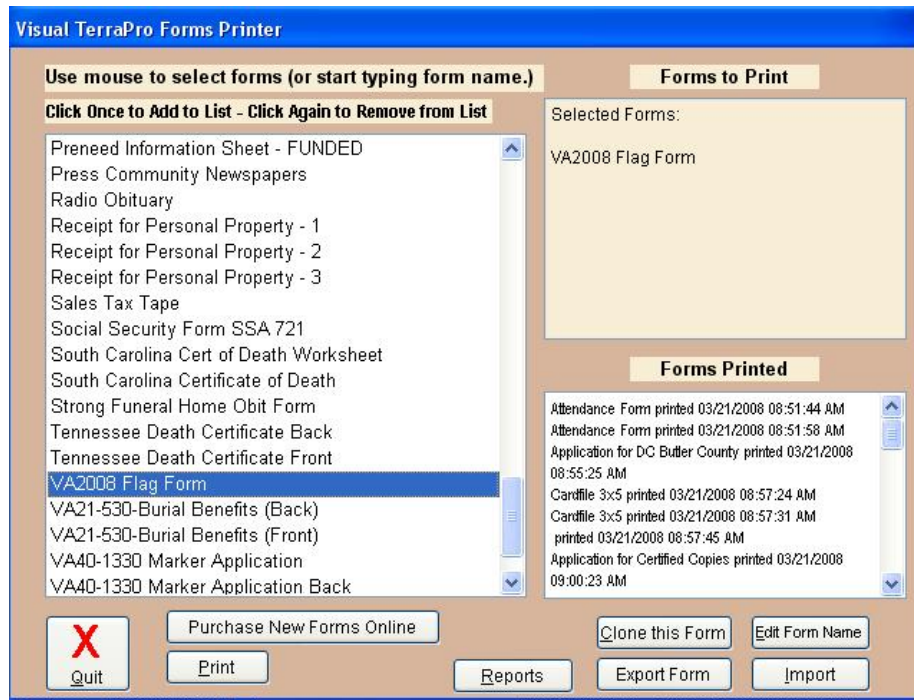


Figure 19 - Form Selection

Your list of forms may look different than the one above, because this list can be fully customized to add or modify forms to fit your exact needs.

As indicated on the screen, you can **click on a form name** to select it for printing. When you do, its name appears on the right hand side of the screen under the list of selected forms. You can **add as many forms to the list** as you like. When you are ready to print, TerraPro will pause between each form to assure that you are ready with the appropriate paper in your printer.

When you click on the Print button you will be asked if you are ready to print. Then you have four choices:



Yes – Go ahead and print – Printer is ready with paper.

Preview – Look at the form on the screen first to check for errors

Skip – Oops, I selected this one by mistake, let's skip over it

Modify – Change the way the form looks. This requires some knowledge of the FoxPro Report Designer. Although not terribly difficult to use, you may want to read chapter 9, Modifying reports and cards, before attempting to modify your own reports. TerraPro personnel are more than happy to make modifications for you at a reasonable cost, so give us a call and let us know what you are planning.

Create Webpage – Any form you can print can be made into a web page. This might be useful for creating online price lists, memorial folders, or other pages.

After printing, you are returned to the form selection screen. Notice that the date and time and name of the form have been added to the list of forms printed. You can edit this list to remind yourself of tasks that need completed.

Other choices are available from the forms screen:

Clone this form – Although cloning humans is not a good idea, cloning your forms can allow you to make modifications in a form without harming the original copy. Clone means make an exact copy.

Purchase New Forms Online – This takes you to the TerraPro Store on the Internet where you can order special forms.

Edit Form Name – Change the name of the form, or add FoxPro commands that gather data or summarize information for the form. You should do this **ONLY** under guidance from a TerraPro representative, unless you are comfortable using the FoxPro command language.

Quit – return to main TerraPro screen.

Print – discussed above.

Export Forms – Copy a form to a floppy disk for modification by TerraPro personnel.

Import – Copy form from floppy disk after modification by TerraPro personnel.

CardShop

Using TerraPro's CardShop makes printing memorial merchandise a snap. Pictures and verses can be changed to customize your folders and prayer cards to meet your family's requests.

Choose CardShop on the TerraPro main screen menu by clicking on the button labeled CardShop.



Figure 20 - Opening CardShop presents you with this screen

CHOOSE CARD

The first thing you must do when starting CardShop is to choose a card to print. Click on the arrow at the end of the box labeled Choose Card: and you will see a list of the cards or other memorial merchandise that have been setup for you by TerraPro personnel. These are grouped as Acknowledgement Cards, Memorial Folders, Prayer Cards and Register Book. Other types of printed memorials may also be listed, depending on your needs.

Once you have chosen a card, the following screen will appear:

Show/Print Card Add a New Card Choose Card: Memorial Folder
 Edit Card Refresh Data Choose Verse: Psalm 23
 Edit Data Send to Word Text Font = Times New Roman Change Text Color Change
 Verse Font = Times Roman Change
 Modify Layout of 29088.FRX Make Webpage Top Margin for Verse 1 Verse has 2 Lines
 Export Card Import a Card Add/Edit Verses Font Size for Verse 12 Current FontSize is 13
 Help Quit Tribute Center

The Twenty-Third Psalm

The Lord is my shepherd; I shall not want.
 He maketh me to lie down in green pastures:
 He leadeth me beside the still waters.
 He restoreth my soul:
 He leadeth me in the paths of righteousness
 for His name's sake.
 Yea, though I walk through the valley
 of the shadow of death, I will fear no evil:
 for Thou art with me:
 Thy rod and Thy staff they comfort me.
 Thou preparest a table before me
 in the presence of mine enemies:
 Thou anointest my head with oil:
 my cup runneth over.
 Surely goodness and mercy shall follow me
 all the days of my life: and I will dwell
 in the house of the Lord for ever.

IN MEMORY OF
Robert David Probos
Shlomo Kaditz
DATE BORN
 February 21, 1936
DATE DIED
 June 30, 2015
Mass of Christian Burial
 Trinity Baptist Church
 Marion, Ohio
 Thursday, July 2, 2015
 11:00 AM
OFFICIATING
 Rabbi Bob Alper
 Rev Horatio Robinson
 John Johannsen
Cremation
 Marion Cemetery
 Marion, Ohio
 Arrangements by
 Joseph P. Sample Funeral Home, Inc.

Edit Card RTF

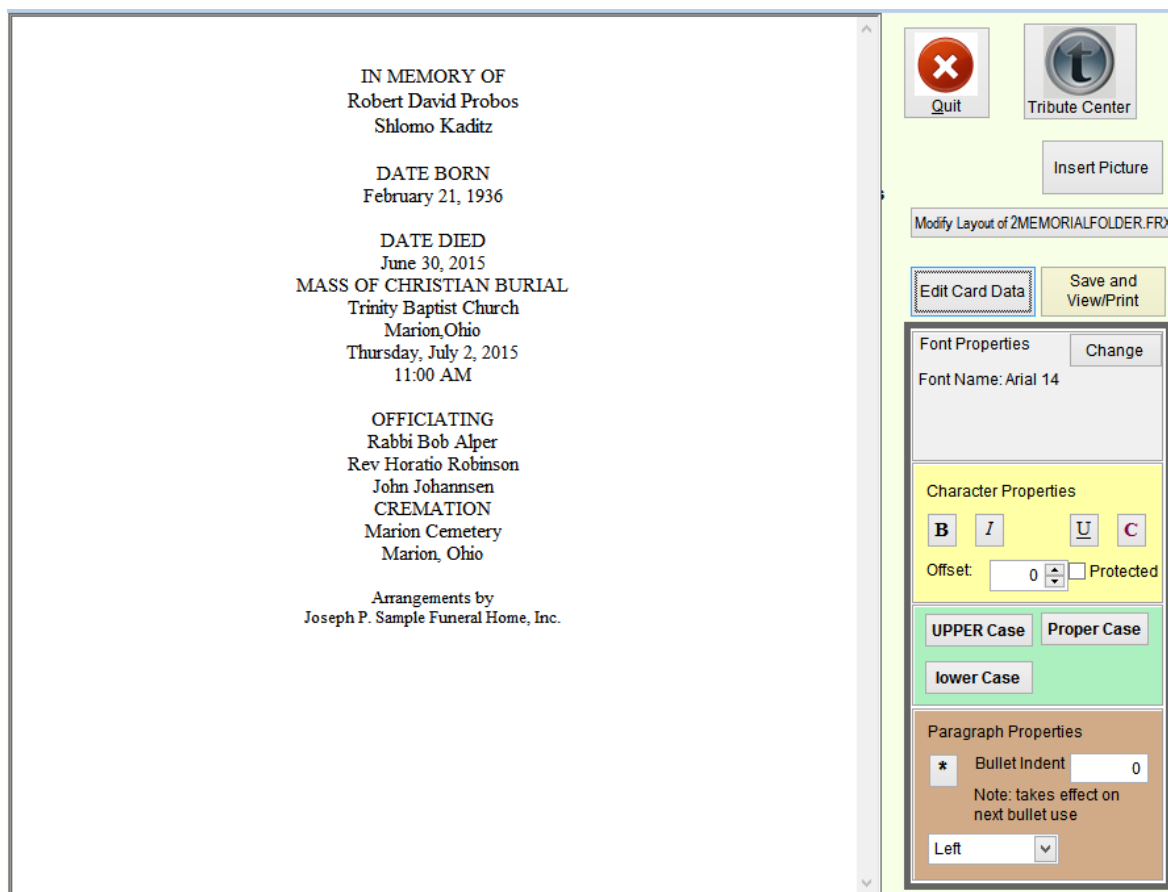
Figure 21 - After choosing a card, these buttons appear and the card information can be edited.

If the card looks good, just click the Show/Print Card in the top left corner of the screen and print on your card stock. (See item

If you need to change the data, you can type over it on the screen, or use the Edit Card RTF option:

EDIT CARD
RTF

The layout of the card can be changed, along with new data and font changes. Click on the Edit Card RTF button and you will see the following screen:



Just like in a word processor such as Microsoft Word™, you can use your mouse to highlight certain areas of the text and change the font properties. The buttons on the Font Properties window will act on the highlighted text only.

If you need to change the layout drastically, we suggest consulting a detailed explanation of the FoxPro report generator as it pertains to the CardShop. A little learning here can help you create almost any card, page or folder you like. The method is described in Appendix D.

EDIT CARD (Press the button labeled “*Edit Card*”, if you do not see a screen similar to the one above.)

The information on the card can be edited on the screen. For example, the location of the Funeral Service is Trinity Baptist Church, but the city and state are missing. You can type them in on this screen. *(due to centering issues, when clicking on a line, the line may disappear, just press the TAB key and you will be at the beginning of the line)*

The headers (such as DATE BORN, DATE DIED, etc) can also be changed. If you have been using TerraPro for a while, you may require a little help from TerraPro personnel to change the layout of your cards to enable this feature. The method is described in Appendix D.

SHOW CARD

Press the button labeled Show Card, and you might see this:

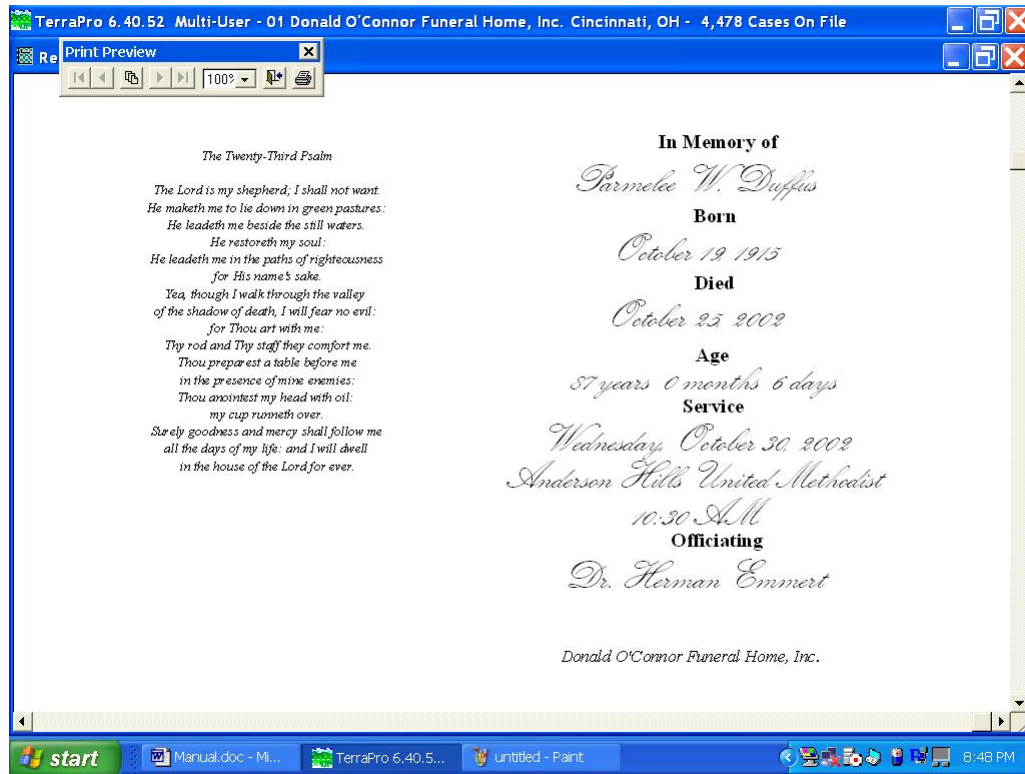


Figure 22 - Show Card brings up a preview of the card with print option
(in this case, data is different to show unlimited combinations of fonts and styles)

This looks pretty good, but the verse is a little small, and not centered vertically very well. Let's close this up using the print dialogue box exit button: (We call it "going out the exit door.")



Choose Card:

Choose Verse:

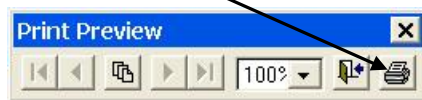
Top Margin for Verse Verse has 19 Lines

Font Size for Verse Current FontSize is 8

ADJUST CARD

Since the verse font size (the size of the printing) was a little small, we will adjust it from 8 points to 10 points. Either type 10 in the Font Size for Verse box, or click on the up arrows to increase the font size. (This type of control is called a spinner, and is handy when using the mouse to change the value of the object.)

Preview the card again by clicking on Show Card. If it looks good, you can go ahead and print using the Print Preview box Printer Icon.



PRINT CARDS

If needed, you can adjust the font size further, or adjust the top margin until you are happy with the position and size of the verse. Print one copy of the card to assure everything looks good in print, then make any other adjustments you like, and then use the print dialogue to print as many cards as needed:

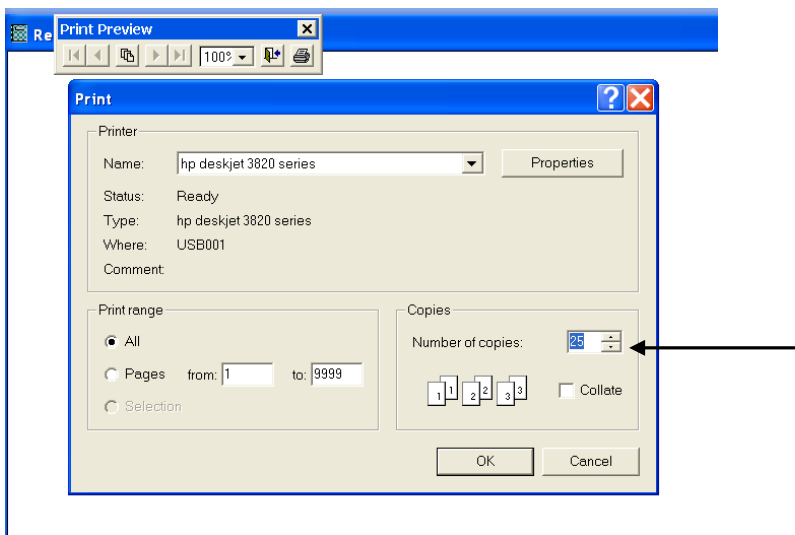


Figure 23 - Print Dialogue Box

EDIT DATA

Sometimes the card looks good, but the data which prints is wrong. You can edit the data on the screen or by using the Edit Data button. If you press it, the Data Editing box shows up:

A screenshot of the 'TerraPro CardShop' application. The window has a blue title bar and a menu bar with 'Vitals', 'Service/Disposition', 'Family', 'Call Bearers', 'Music/Clergy', 'Photograph', and 'Funeral Program'. Below the menu bar is a toolbar with buttons: 'Show Card', 'Add a New Card', 'Edit Card', 'Refresh Data', 'Edit Data', 'Modify Layout of 2MEMS FRX', 'Make Webpage', 'Export Card', 'Import a Card', and 'Add/Edit Verses'. The main area is divided into two sections. The top section is for card configuration, with 'Choose Card:' set to 'Memorial Folder' and 'Choose Verse:' set to '23rd Psalm'. It also has 'Text Font = Times New Roman', 'Text Color' (with a 'Change' button), 'Top Margin for Verse' set to '0', 'Verse has 10 Lines', and 'Font Size for Verse' set to '0' (with 'Current FontSize is 12' noted). The bottom section is for personal data, with fields for 'Name' (David Joseph Haldeman), 'Firstname' (David Joseph), 'Lastname' (HALDEMAN), 'Name2', 'Placard1' (FUNERAL THU. 10 AM), 'Placard2', 'Birthdate' (January 26, 1945), 'Birthplace' (Marion, Ohio), 'Deathdate' (January 21, 2008), 'Deathplace' (Symsonia, Kentucky), and 'Age' (62). At the bottom, it says 'This Data is for Memorial Folder ONLY:'.

Figure 24 - Clicking on the Edit Data Button allows changing the data appearing on each card

There are seven tabs on the data editing screen to allow you to change almost any data which might appear on the various cards. *Some data does not apply to a given card; for example when printing the Memorial Folder, there is no need to enter Family data, as it does not appear on a Memorial Folder.* A reminder appears at the bottom of the screen to let you know that this data will be saved with this card, but changes will not appear on other cards.

Although the data shown is copied from the case data you entered originally, *changes made here will not be reflected on the case data.* This allows you to make changes for the cards (like nicknames, etc.) which would not be appropriate for death certificates and other government documents.

VITAL
STATISTICS

Think of the data items you are editing as building blocks for constructing the various cards you are printing. The first and last names can be printed separately if needed, or the birthdate can be shown as October 19, 1915 instead of all numbers 10/19/1915 as originally entered. At some point, you may want to read Chapter Ten to learn how to modify cards to customize them. When you do you will be referred to these screens to discover the data items which will be placed on cards.

SERVICE /
DISPOSITION

Figure 25 - Service and Disposition Editing

Why so many Ceremony fields? If there are multiple services in other towns, there may be a need for them. Otherwise, they can be used for other information not gathered by the program. In other words, just because data is labeled Ceremony4 doesn't mean it HAS to contain information about the 4th ceremony. If you never use 4 ceremonies, that data spot can be used for something else.

Why is the cemetery state blank? If you have been using TerraPro for a long time, you may be aware that cemetery locations used to be stored with the city and state in the same field (like the example above where it says Union Twp, Ohio). Newer versions of TerraPro store the state in a separate field, and would have filled in the state. New users won't have to edit their location lists to move the state out of the city field and into the state field, but older users may want to make this change. See index entry under *Locations* for more details on how to do this.

The field called Lot contains information about the cemetery section , lot and grave. This will probably need some editing if certain terms do not apply.

F A M I L Y

TerraPro CardShop

Show CardAdd a New Card

Choose Card: Register Book 3 - Family Record X
Quit

Edit CardRefresh Data

Text Font = Times New Roman Change **Text Color** Change

Edit Data

Modify Layout of REGFR.FRX Make Webpage

Export Card Import a Card

Add/Edit Verses

Vitals**Service/Disposition**Family**Pall Bearers****Music/Clergy****Photograph****Funeral Program**

Spouse Karen Sue Haldeman

Father Walter Clifton Haldeman

☐ Enter family using memo

Mother Trella Frances Hemmerly

Children1 Sarah Sapp

Children2 Josh Haldeman

Children3 Jed Haldeman

Children4 Susannah Haldeman

Children5

Children6

Children7

Children8

Children9

Children10

This Data is for Register Book 3 - Family Record ONLY:

Figure 26 - Family Data Entry

Family data is usually used for the Family Record Page of the Register Book, so the card selected has been changed to that page.

TerraPro CardShop

Show CardAdd a New Card

Choose Card: Register Book 3 - Family Record X
Quit

Edit CardRefresh Data

Text Font = Times New Roman Change **Text Color** Change

Edit Data

Modify Layout of REGFR.FRX Make Webpage

Export Card Import a Card

Add/Edit Verses

Vitals**Service/Disposition**Family**Pall Bearers****Music/Clergy****Photograph****Funeral Program**

Spouse Karen Sue Haldeman

Father Walter Clifton Haldeman

☒ Enter family using separate lines

Mother Trella Frances Hemmerly

Haldeman, David Joseph his father, Walter Haldeman and his uncle, Harold W. Rockwell and his step-father Ray Romine, , beloved husband of Karen Sue Haldeman, (nee Meister), loving father of Jedediah Thaddeus Haldeman, Benjamin Jacob Haldeman, Sarah Hilary Sapp, Joshua Joseph (Flavia) Haldeman, Susannah Elizabeth M. Haldeman, brother of Kathi Haldeman Sands, grandfather of Thaddeus David Sapp, Crystal Shanda Lear, Dee Lori Ann Haldeman great-grandfather of 3
April 1, 2008, Age 63 years. Residence Cincinnati. Funeral Service at Trinity Baptist Church, , on Friday, April 4, 2008 at 10 AM. Friends may call Tuesday, April 8 from 4:00 PM to 8:00 PM. Cremation at Cincinnati Cremation Company, Cincinnati, Ohio. Memorials may be made to American Cancer Society/ Joseph P. Sample Funeral Home, Inc. serving the family.
www.samplefuneralhome.com

This Data is for Register Book 3 - Family Record ONLY:

Family members can be entered in *two different ways*: to appear on lines preprinted on your register book, or free form as you want them to appear. Check the button marked Enter family using memo to use the obituary or family data (constructed by clicking on the family button on the Obituary page of the Case Data). If you use the separate lines method, remember that you can use more than one name per line, but you are limited by space to ten lines.

PALL BEARERS

Figure 27 - Pall Bearer Data Entry

If you know the names of Pall Bearers in advance, here is where you can put the names. Honorary Pall Bearers can be so indicated.

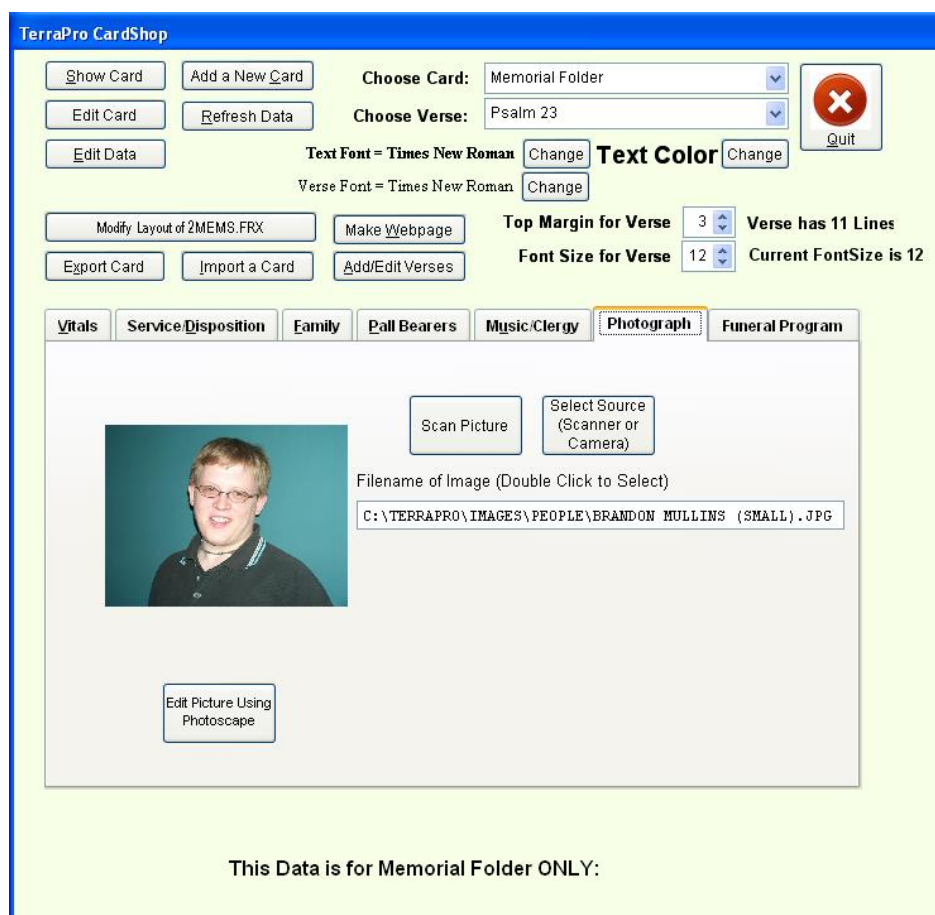
MUSIC / CLERGY

Figure 28 - Music and Clergy Data Entry

You can list a few of the musical selections by grouping them on a single line. The clergy is brought over from the case data, but can be changed here for any reason. You can also add a fourth, fifth or sixth clergy by grouping them on a single line.

offerings.

A photograph on a memorial folder can be a meaningful tribute to the deceased, and if you have a scanner or the family can supply a picture in digital format, you can add photos to any of your memorial merchandise



TerraPro can scan a photo using your scanner software. Place the picture on your scanner, click the “Scan Picture” button and crop and scan your picture as usual. It will be saved automatically to the TerraPro\images\people folder so that everyone on your network can retrieve it.

SELECT
IMAGE
SOURCE

If you have already scanned or received a photo outside of TerraPro, you MUST know where the photo is stored on your computer. Typical scanner programs save your pictures in a folder called My Pictures. The exact location of My Pictures can be discovered if you use the *My Computer* icon on your desktop or the Start Menu to explore your computer’s folders. It is important you know where the photo is saved, and *if given the opportunity to save the picture* after scanning, you should put them in the TerraPro (or VTP) folder under a folder named People within a folder named Images. (typically C:\TerraPro\images\people)



What are Folders?

Just like file folders that hold related information in your filing cabinet, folders on the computer hold files (pictures, documents, etc.) that are related to each other.

Just like your filing cabinet, the computer does not care what you call your folders or files. However, if you don’t remember where you put a folder (what you called it) then you could have

trouble finding it later on. It is best to write up some rules about where you will be saving your pictures and placing them near the computer so everyone knows where they are stored.

Printing Reports

Getting information back that you have entered is easy with the TerraPro Report Generator. It can help with accounting and bookkeeping tasks, or give you information about the status of your business.

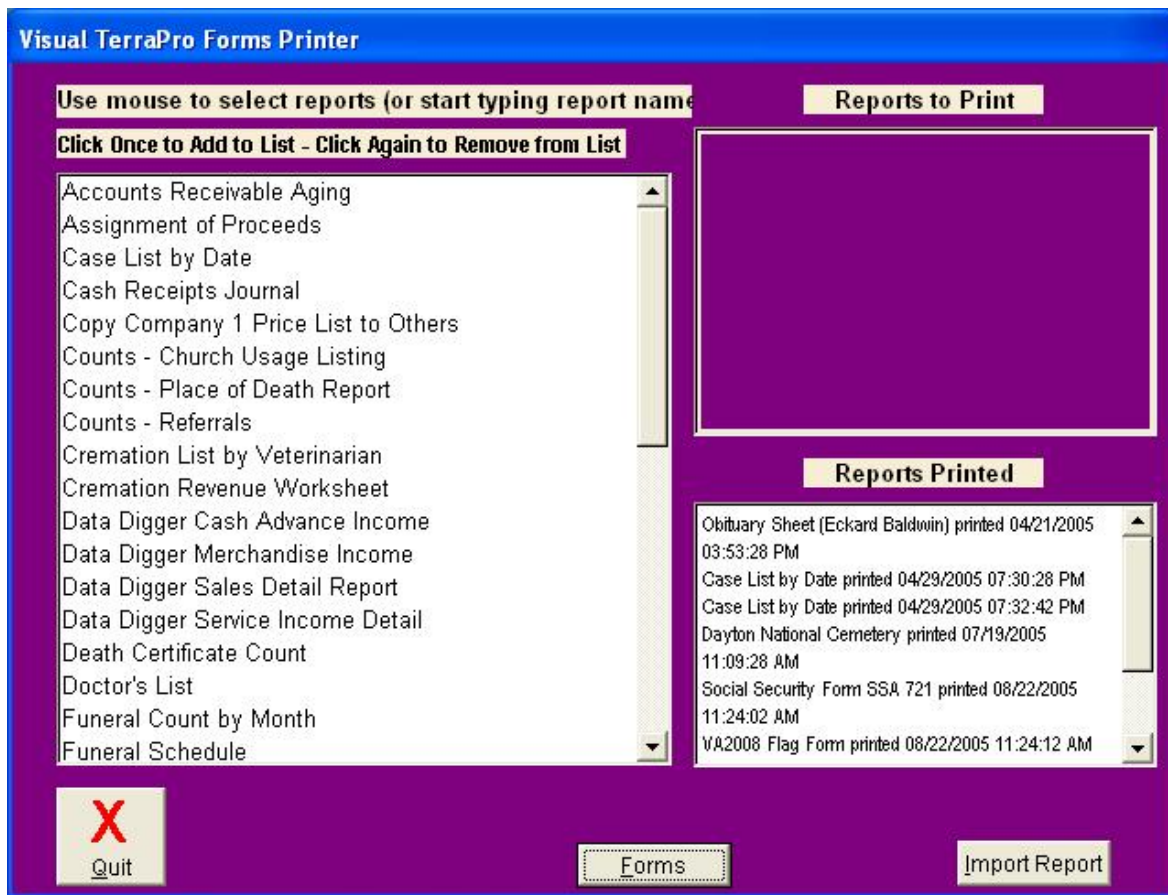


Figure 29 - Reports Screen

You can Print Reports very quickly. Choose Forms/Reports from the Main Menu, then press the button labeled **Reports**. The screen above will appear and just like forms, you can choose to print any report on the list.

Use the mouse to click on the desired report, and it will be added to the list of Reports to be printed. When you click on print, each report will be brought up in turn, and you may then be asked for some input, such as starting and ending dates for the report (if appropriate). Enter the information required and the report should appear on the screen. You may then choose to print the report or close it.

Microsoft Visual FoxPro

Report Designer - openar.frx - Page 6

Print Preview

Donald O'Connor Funeral Home, Inc.
Accounts Receivable Aging Report

Deceased	Filenumber	Bill Date(days)	Amount	Balance	Last Pay	Person Responsible
Margaret Thompson	1993-402	11/27/01 (414)	4,432.19	4,432.19		Ralph F. Thompson
William Adams	1993-402	11/27/99 (1145)	4,588.94	-1.00	11/1/00	Alberta A. Adams
Hazel McComas	1993-402	11/29/01 (4065)	3,114.20	2,333.20	08/11/94	Ken McComas
Fannie O'Neal	1993-402	12/05/01 (406)	1,831.41	530.00	07/29/02	Brian O'Neal
Valmette Lapsley-Rooster	1993-402	12/05/99 (1502)	3,138.62	1,813.62	04/15/99	Marty Rooster
Elizabeth Coon	1993-402	12/08/93 (3325)	1,267.63	1,187.63	03/12/02	Ruth Coon
James Sapp	1993-402	12/09/96 (2228)	3,412.20	2,962.20	08/16/97	
Christina Reeves	1993-402	12/12/01 (389)	5,838.48	5,838.48		Shannon Johnson
Mark Gault	1993-402	12/12/95 (2591)	104.00	104.00		Kim Booher
Carol Coley	1993-402	12/14/88 (5145)	3,467.73	1,812.73	12/17/94	
Lura Cummings	1993-402	12/16/95 (2587)	4,041.18	154.00	08/19/99	Billy Cummings
Juanita Goodman	1993-402	12/16/96 (2221)	4,373.64	265.67	02/27/02	Larry Goodman
William Miller	1993-402	12/17/91 (4047)	3,498.22	270.00	09/09/96	
Carol Brown	1993-402	12/19/94 (2949)	5,168.66	4,463.66	02/05/96	
Edward Crossley	1993-402	12/27/00 (749)	3,668.04	3,668.04	/ /	Pamela Bromagen
Jacob Bustle	1993-402	12/27/97 (1845)	748.90	78.90	01/28/98	
Margaret DeVore	1993-402	12/28/98 (1479)	1,369.46	1,169.46	11/18/00	William J. DeVore III
Subtotal Over 180 Days Past Due			124,112.70	70,427.78		
Total			911,091.88	664,377.36		

Arlist (c:\vtp\arlist.dbf) Record: EOF/215 Exclusive

start Manual.doc - M... TerraPro 6.40.5... Microsoft Visual ... VTP-Reports-1.3... 1:31 PM

NOTES :

AfterCare

Keeping contact with your families promotes goodwill in the community and enhances your image as a caring business.

TerraPro comes with a complete Post Service Follow-up system. It can help you keep in touch with your families and provide information for them to make decisions about preplanning and other services you offer.

To access the system, you will use the Survivors screens. Each survivor can be approached separately for After Care services and recording of contact information. Use the help button for guidance.

Survivors File for Robert James Probos - Case # 2011-501- Died October 19, 2011

Spouse Information **Post Service Followup** **Letters** **Labels/Cards**

SURVIVOR: Mary Ellen Probos

☒ Prospect?

☒ Approach for Marker?

	Due	Made	Staff initials
Post Service Followup	05/10/2010	03/01/2011	KS
Six Month Call	10/25/2010	03/01/2011	HR
Anniversary	04/16/2010	04/17/2010	DJ
Annual Followup:	04/26/2011	04/26/2011	DJ
30 Day Followup	05/26/2010	10/01/2011	

Results:

Copy of Grief1 to Mary Probos Letter Printed on 03/16/2010 12:15:55 PM
 Preneed Approach Letter to Mary Probos Letter Printed on 03/01/2011 03:41:47 PM
 Sympathy Letter to Mary Probos Letter Printed on 03/30/2011 12:35:09 PM
 Grief Letter #2 to Mary Probos Letter Printed on 03/30/2011 12:35:30 PM

Google Map Previous Next <...CHOOSE ANOTHER PERSON

Save & Quit

Figure 302 - After Care (Post-Service Followup) Screen

Checking the box next to the word “*Prospect?*” will automatically fill in milestone dates such as follow-up calls and anniversary dates. You can change the descriptions of your aftercare milestone dates and the elapsed time before these dates by **right-clicking** the date box you wish to change. These changes will then apply to ALL subsequent survivors tracked by the system. You may freely change the dates for a particular survivor without affecting others.

When dates for follow-up are entered on these screens, a report can be generated showing the past due contacts which need to be made. At that time, the After Care consultant can make those calls and record the results of the call. With this system in place, everyone who has access to the computer can see what is happening with each of the After Care recipients, and step-in to follow-up in the event of a phone call from the survivor.

Report Designer - psfp. frx - Page 1

Date: 01/15/2003
Time: 13:46:40

Donald O'Connor Funeral Home, Inc.
Post Service Followup Report

Name of PreNeed Contact
 Relation to Deceased: Informant
 Also MotherPerson Responsible

Deceased / Funeral Date

Marcella Haley
 2623 Saddleback Drive
 Cincinnati, OH 45244
 Home Phone: 513/232-2384
 Work Phone:

Brent J. Haley
 March 24, 1998
 Post Service Followup Due:
 April 7, 1998

Post Service Call Made: _____
Results: _____

Figure 31 - Sample After Care or Pre-need Solicitation Report

As with all other TerraPro reports, the content of this report can be edited if necessary.

You may wish to place this survivor on a mailing list for mass mailings. If so, use the main survivor screen tab, and enter two letter codes to indicate your different mailing lists. See Chapter Seven, *"Envelopes and Labels"*, for more details about mailing lists.

Case Information
 Probos, Robert

Add New Case
 Edit Survivors
 Write Obit
 Edit Current Case
 Arrangements
 Edit Bill
 Crematory

Forms, Reports
 Forms / Reports
 Card Shop
 Envelopes-Labels

Office
 Doctors/Clergy Lists
 Price Lists
 Monthly Statements
 Cash Receipts
 Utilities

Our Website TerraPro Website
 Rescue
 Check for Update
 Quit
 Marquee
 Tribute
 Family Advisor™
 Show Comments

If you are having any trouble understanding this feature, please use the Rescue button on the main TerraPro screen to call for free help.

LETTERS

TerraPro comes with a wide assortment of pre-written letters, all of which can be modified or copied to make new letters. Choose the Letters tab on the Survivors screen to access letters. These letters can be sent to a specific person or group of people (Standard Letters), or can be sent to all those requiring followup. (After Care Letters). Click the help button for a quick reminder of how this system works.

To start, choose a letter to be sent using the **Choose Letter** button at the upper left. Upon selection, the letter will be previewed, and can be printed if desired. If you want to make changes, just opt to exit out of the preview using the door icon.

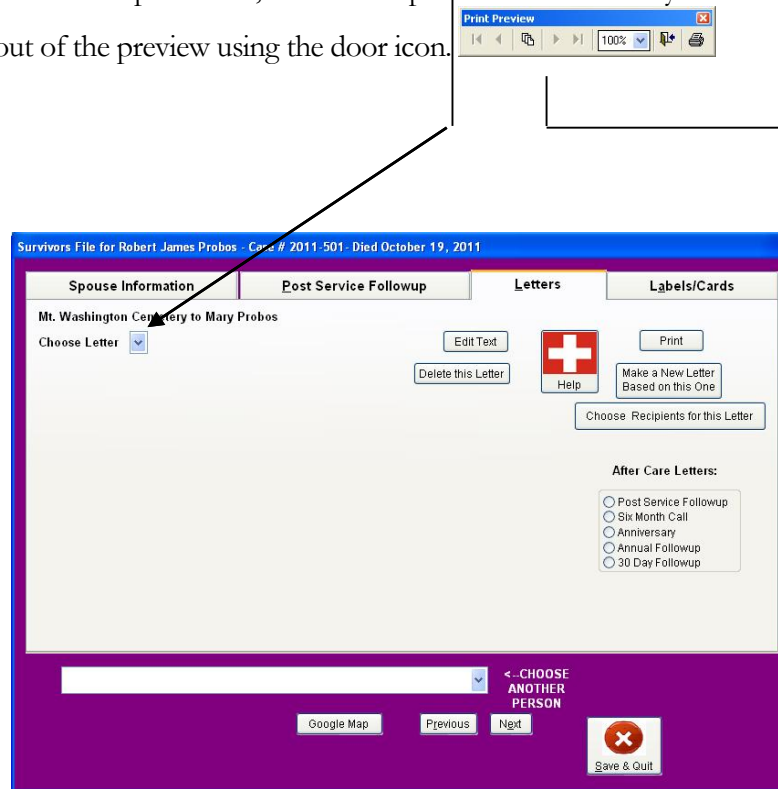


Figure 32 - Followup Letters

Choosing Edit after you have selected a letter will allow you to change the content:

Survivors File for Robert James Probos - Case # 2011-501 - Died October 19, 2011

Spouse Information	Post Service Followup	Letters	Labels/Cards
<p>Military Followup Letter and then click Save:</p> <p>Letter Name <input type="button" value="Save"/></p> <p>Dear <<f0salutation("SURVIVORS")>>; <input type="button" value="Delete this Letter"/></p> <p>When your <<LOWER(f0relation(lc_surv,,t))>> entered the <<ALLTRIM(VETERANS.Branch)>> on <<f0longdate(VETERANS.Entrydate)>>, I'm sure your family felt a sense of loneliness. Today many young men and women are entering our armed services, and need some contact with local neighbors and friends. To that end, we have established a pen pal system.</p> <p>The outer burial container you chose for your <<LOWER(f0relation(lc_surv,,t))>>, the <<PROPER(ALLTRIM(CASES.Vault))>> is an excellent choice and will protect your investment of a <<ALLTRIM(CASES.Casket)>> casket for many years to come.</p> <p>Let me take this opportunity to thank you for the trust and confidence you placed in our services for your <<LOWER(f0relation(lc_surv,,t))>>. We will do everything in our power to maintain that trust as time goes by.</p> <p>Sincerely,</p> <p><<f0name("STAFF",CASES.DIRECTOR)>> Funeral Director</p>			
<p><input type="button" value="Help"/></p> <p>After Care Letters:</p> <p> <input type="radio"/> Post Service Followup <input type="radio"/> Six Month Call <input type="radio"/> Anniversary <input type="radio"/> Annual Followup <input type="radio"/> 30 Day Followup </p>			
<p><input type="button" value="Google Map"/> <input type="button" value="Previous"/> <input type="button" value="Next"/></p> <p><-CHOOSE ANOTHER PERSON</p> <p><input type="button" value="Save & Quit"/></p>			

Figure 33 - Editing the Letter

You can change the name of the letter and setup what the data environment will be before printing the letter. YOU CANNOT CHANGE FONTS ON THIS SCREEN. You will need to choose Modify when printing the letter to modify fonts and paragraph styles.

You can type the letter to say whatever you want. To insert a merge field (data that will change when the letter is sent to a different person), you can surround the merge field with << and >> delimiters.³ If you don't know what to put within the << >> delimiters, right-click where you want the merge field to go. You will see the following list:

³ This is very similar to the way Microsoft Word handles data merging except your data source is your TerraPro data.

Select Data Item, then Press CTRL-W	
Descript	Sourcefiled
Date of Death - long form (January 26 1994)	f0longdate(CASES.Deathdate)
Date of Death - short form (JAN 26 1994)	f0shortdate(CASES.Deathdate)
Date of Funeral Service (as entered)	ALLTRIM(CASES.Service)
Date-Today - long form like January 10, 1994	f0longdate(DATE())
Date-Today - short form (JAN 10, 1994)	f0shortdate(DATE())
Deceased's Birthplace (City, State)	TRIM(CASES->Cityborn)+IIF(NOT EMPTY(CASES
Deceased's Date of Birth (Numbers)	CASES.Birthdate
Deceased's Date of Burial (Numbers)	CASES.Burialdate
Deceased's Date of Death (Numbers)	CASES.Deathdate
Deceased's Name / First Middle Last	deceased
Deceased's Name / First, Middle, LAST Upper	ALLTRIM(CASES.First)+IIF(EMPTY(CASES.Middle)
Deceased's Name / Last, First Middle	ALLTRIM(CASES.Last)+", "+ALLTRIM(CASES.First
Deceased's Residence (Address)	f0address("SURVIVORS","SE")
Deceased's Residence (City, State ZIP)	f0csz("SURVIVORS","SE")
Deceased's Residence (Street)	f0street("SURVIVORS","SE")
Deceased's Residence - State Only	f0state("SURVIVORS","SE")
Deceased's Residence - ZIP Code Only	f0zip("SURVIVORS","SE")
Deceased's State of Death	ALLTRIM(CASES.Statdeath)
Disposition	ALLTRIM(CASES.Disposal)
Disposition of Body - Prints Other Method	IIF(UPPER(ALLTRIM(CASES.DISPOSAL))="OTHEI
Disposition of Body - Puts XX if Burial	IIF(UPPER(ALLTRIM(CASES.DISPOSAL))="BURIA
Disposition of Body - Puts XX if Cremation	IIF(UPPER(ALLTRIM(CASES.DISPOSAL))="CREM.
Disposition of Body - Puts XX if Donation	IIF(UPPER(ALLTRIM(CASES.DISPOSAL))="DONA

Figure 34 - TerraPro data merge expression list

You can choose any data expression that matches what you need to merge into your letter. If the data expression does not exist on the list, you can add it by pressing CTRL-Y and filling in the appropriate data expression. This could be copied (using CTRL-C) from another form by modifying that form and grabbing the data expression and then pasting it here (using CTRL-V). Or you can call TerraPro personnel and they will help you determine the expression you need in order to retrieve the data.

Pressing CTRL-W then pastes the correct merge field into your letter:

Dear <<f0salutation("SURVIVORS","IN")>>;

We at the <<m0cname>> would like to take today as an opportunity to once a
our deepest sympathy at the loss of your loved one | <<deceased>> ←

If there is anything we can do for you over the next few weeks, please let us kr
understand that during a time of loss, there may be things to do that fall outsi
routine. Feel free to call us for advice on anythings that may be troubling you

Figure 35 - Letter with new merge field << deceased >> added.

You can also copy (clone) an existing letter to make a new one. Just be sure you give it a unique name and letter code. Edit the letter to say what you want, and you have a new letter ready to go. If you need to change fonts on the letter, add your letterhead or otherwise customize the letter format, choose Print, then choose Modify. See the Chapter Ten for a tutorial on how to modify reports.

AFTER CARE LETTERS

After Care is one of the best tools you have for maintaining a presence in your community. When your community knows you, and remembers a positive experience at your funeral home, they are more likely to call you in time of need.

Fortunately, you have purchased a very powerful tool to help you maintain contact with those you have served. TerraPro's After Care System can handle your contact management, mass mailings, to-do reminders and followup all in one place.

The concept is simple: You make yourself visible and accessible as you serve your families. Make mental notes, or hand out a card or fill-in (short) form. Later, these cards can be entered into the After Care System.

Following the steps outlined at the beginning of this chapter, you can start developing your contact list into a very valuable tool. After-Care Letters can be sent using the built-in schedule of Post-Service Follow-up – 2 weeks after service, Six Month Call, Anniversary Card and Annual Follow-up and a Pre-need Solicitation Letter at any time.

Six Month Letter (2 Due.)

Preview Each Letter ☒

Print Aftercare:

- ☐ Post Service Followup
- ☒ 6 Month Call
- ☐ Anniversary Card
- ☐ Annual Followup
- ☐ Preneed Call

We recommend hand addressing of letters to assure that they will be read. If this is not possible, window envelopes make addressing easy. Labels can be printed after letters are printed, if desired.

NOTES:

Envelopes and Labels

A complete mailing list program is provided within TerraPro, to ease the task of addressing envelopes and tracking names and addresses of all your contacts.

To access the Envelope Printer, select Envelopes – Labels on the Main TerraPro Menu. You will see the following screen:

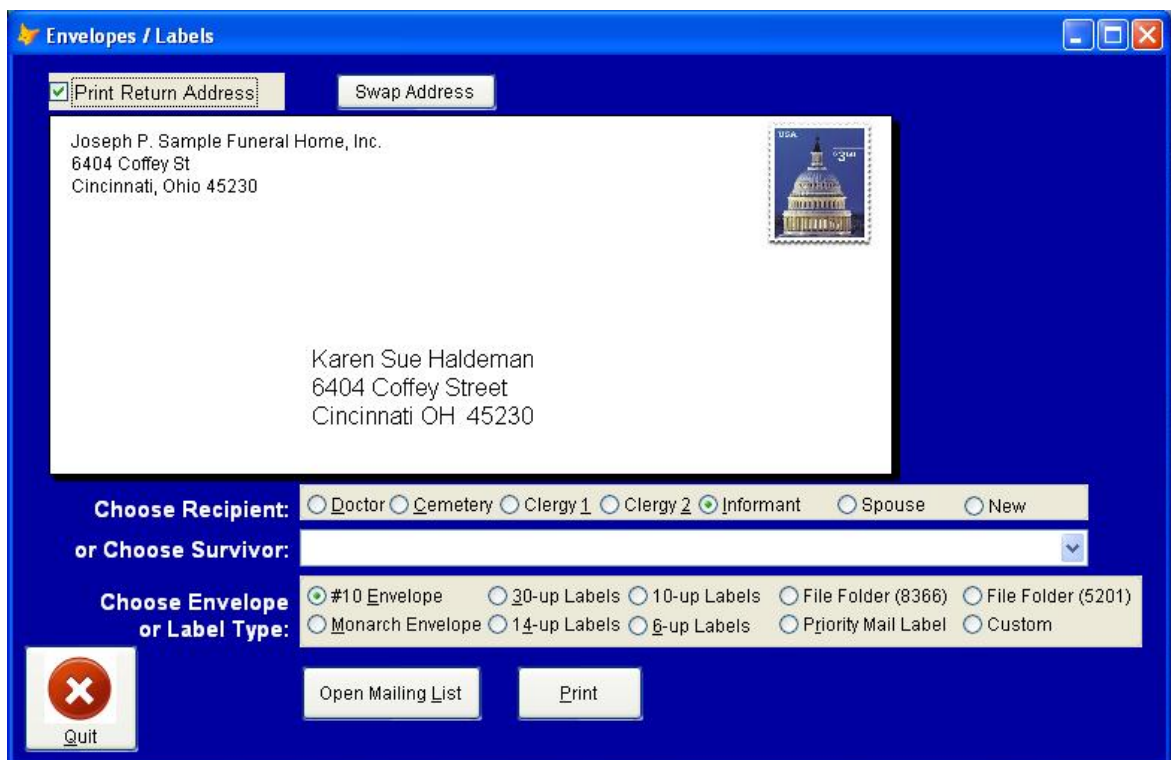


Figure 36 - Envelopes and Labels Screen

If you want to use a plain envelope, click on the box labeled Print Return Address and your funeral home address will appear. You can print a Self-Addressed, Stamped Envelope (SASE) by clicking the *Swap Address* button at the top.

You can type over any address that appears (return address or main address) to create a custom, one-time envelope for immediate use.

To select commonly used addresses, you can click on Doctor, Clergy 1 & 2, Cemetery or Informant. (informant comes up first by default). The list of survivors for this case is below those choices; click on the arrow to the right and the list will pop up. Then the address (if entered) will be placed on the envelope.

There are two envelope and four label formats available – to choose one, click on the appropriate check box next to its name. For labels, use Avery 5160 labels for the 30-up labels, 5162 for 14-up and 5164 for 6-up shipping labels. The post office can supply you with Priority Mail labels.

PRINTING
LABELS

When you choose a label format such as 30-up, the following appears on the screen:

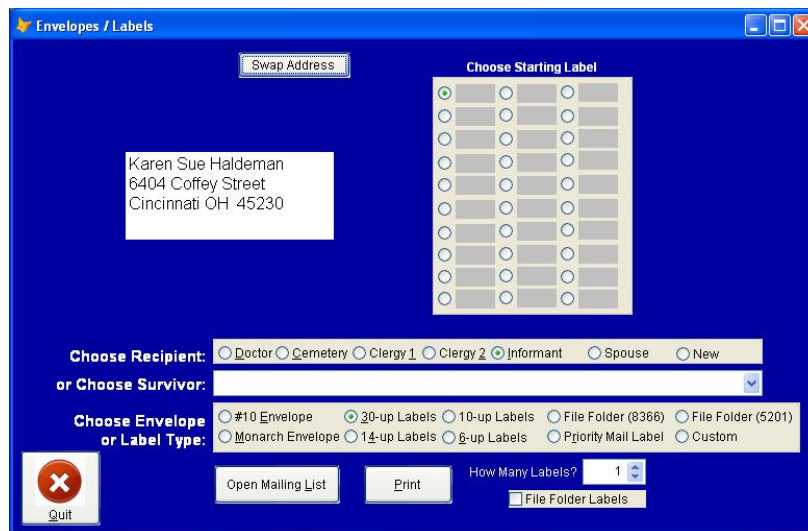


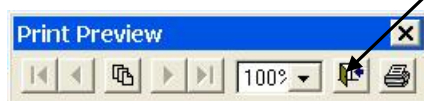
Figure 37 - Label Guide

The diagram at the right side of the screen allows you to select which label to start printing on. This can save many sheets of partially-used labels and avoid excessive costs of purchasing labels, only to throw away half of them.

At the lower right you can choose how many of the labels you need (in case you want to produce more than one label to the same address.)

For the 30-up labels only, you can also check the box labeled “File Folder Labels” and the address will change to the Decedent Name, File Number and Death Date so that you can print a spiffy looking label for your paperwork file folder. You can also print Avery File Folder Labels by choosing that option. We also have included a spare “custom” label for special needs.

When you have made your selections, click Print, load labels in the printer and check the preview screen for any last minute changes, and then click print. (click on the Exit button if you don’t want to print.)



MAILING LISTS

Click on the Mailing List button, and you will see the screen below:

Last, First	Address	City, State	ZIP	Code/Rec#
#315 F. & A.M., Joppa Lodge				Cl- 942
& Stern, Pierce,	6931 Arlington Rd., Suite 400 Bethesda	MD	20814	ML-1016
/Clergy, Family				Cl- 413
668 F. & A.M., Oakley	Ridge & Madison Roads	Cincinnati	OH 45228	Cl- 179
Abler MD, D.	3020 Hospital Drive #110	Batavia	OH 45103	CE-1146
Abler MD, D. Victor	3020 Hospital Drive #110	Batavia	OH 45103	CE- 648
Adams Farmer, Patricia				Cl- 604
Adams, Coroner, Robert	810 Barrett	Louisville	KY 40204	CE- 652
Adams, Virginia	1649 Hilltree Drive	Cincinnati	OH 45255	SJ-1154
Adams, Virginia	1649 Hilltree Drive	Cincinnati	OH 45255	XX-1159
Adams, Virginia	1649 Hilltree Drive	Cincinnati	OH 45255	XX-1160
Adams, Virginia	1649 Hilltree Drive	Springfield Tow	OH 45255	AN-1173
Adams, Coroner, Robert	810 Barrett	Louisville	KY 40204	-1143
Ahrens MD, Kirsten	3333 Burnet Avenue	Cincinnati	OH 45229	-1144
Ahrens MD, Kirsten	3333 Burnet Avenue	Cincinnati	OH 45229	CE- 887
Aichele, Raymond	St. Veronica St. Mary's Semina			Cl- 741
Albers MD, Mary	2800 Winslow Avenue Apt 3	Cincinnati	OH 45206	CE- 793
Albright Jr. MD, Robert	506 Oak Street	Cincinnati	OH 45220	CE- 664
Albright MD, Robert	234 Goodman Avenue #501	Cincinnati	OH 45267	CE- 360
Alcorn, Christena	2212 Observatory Ave Knox Pres	Cincinnati	OH 45224	Cl- 936

☐ Doctors
 ☐ Clergy
 ☐ Mailing List
 ☐ Staff
 ☐ All
 ☐ Select:

Quit

Figure 38 - Mailing List Screen

Your mailing list is made up of all the Doctors, Clergy and Staff you have been entering as you enter Case Data. In addition, whenever you place a survivor on a mailing list by adding up to 10 two-character codes in their record, they will appear on up to 10 mailing lists. It's up to you to define the codes you create for these lists. TerraPro will maintain your code list for you. Choose the list you want by clicking on one of the check boxes. The box labeled **Select:** will let you choose from your mailing list codes you defined on the Survivors Screen.

To choose a name, you can just start typing the last name. The list will automatically move to the letters as you type them, so long as you do not pause too long between letters. When you get close, switch to the arrow keys (or mouse) to make the selection. Clicking on the name and then clicking on Paste will paste the name and address on the label or envelope you selected previously. You can also press the space bar twice quickly to paste the name. Highlighting the name with the space bar or mouse also allows you to Edit the name:

Last, First	Address	City, State	ZIP	Code/Rec#
#315 F. & A.M., Joppa Lodge				Cl- 942
& Stern, Pierce,	6931 Arlington Rd., Suite 400 Bethesda	MD	20814	ML-1016
/Clergy, Family				Cl- 413
668 F. & A.M., Oakley	Ridge & Madison Roads	Cincinnati	OH 45228	Cl- 179
Abler MD, D.	3020 Hospital Drive #110	Batavia	OH 45103	CE-1146
Abler MD, D. Victor	3020 Hospital Drive #110	Batavia	OH 45103	CE- 648
Adams Farmer, Patricia				Cl- 604
Adams, Coroner, Robert	810 Barrett	Louisville	KY 40204	CE- 652
Adams, Virginia	1649 Hilltree Drive	Cincinnati	OH 45255	SJ-1154
Adams, Virginia	1649 Hilltree Drive	Cincinnati	OH 45255	XX-1159
Adams, Virginia	1649 Hilltree Drive	Cincinnati	OH 45255	XX-1160
Adams, Virginia	1649 Hilltree Drive	Springfield Tow	OH 45255	AN-1173
Adams, Coroner, Robert	810 Barrett	Louisville	KY 40204	-1143
Ahrens MD, Kirsten	3333 Burnet Avenue	Cincinnati	OH 45229	-1144
Ahrens MD, Kirsten	3333 Burnet Avenue	Cincinnati	OH 45229	CE- 887
Aichele, Raymond	St. Veronica St. Mary's Semina			Cl- 741
Albers MD, Mary	2800 Winslow Avenue Apt 3	Cincinnati	OH 45206	CE- 793
Albright Jr. MD, Robert	506 Oak Street	Cincinnati	OH 45220	CE- 664
Albright MD, Robert	234 Goodman Avenue #501	Cincinnati	OH 45267	CE- 360
Alcorn, Christena	2212 Observatory Ave Knox Pres	Cincinnati	OH 45224	Cl- 936

☐ Doctors
 ☐ Clergy
 ☐ Mailing List
 ☐ Staff
 ☐ All
 ☐ Select:

Quit Edit Paste

Edit Highlighted Record

Figure 39 - Mailing List Edit Choice (Note Highlighted Entry)

Here is the editing screen:

Visual TerraPro

Mailing List

Code: **CE** License:

Title: Salutation: (Dear ---)

First Name: **Robert** Middle: Last: **Albright MD**

Position: Sex: **M**

Address:

Street: **234 Goodman Avenue #501**

City: **Cincinnati** State: **OH** Zip: **45267**

Phone: -

Workphone: **513-558-4739**

Faxphone: -

Figure 40 - Mailing List Edit Screen

You can make changes on any field. The Code determines which mailing list this name appears on. CE is the standard TerraPro code for Certifier or Physician. The Salutation refers to how you would address the individual in the greeting of the letter.

When finished, you can Save (use Revert only to cancel any changes you might have made in error.)

Use the other buttons to navigate around the list, Deleting duplicates if desired, or Finding on any of the fields listed. At this time, the Print button should not be used until instructed by TerraPro personnel.

If you use Add, the record may not appear on the list when Exiting the Edit screen, but will be there next time you come into the Letters – Envelope screen.

NOTES :

Price Lists

The FTC Rule is completely supported by TerraPro. You can maintain your price lists within TerraPro and then print them out for your families to review, and use them when creating your bills so that all prices agree with your price list.

GENERAL PRICE LIST

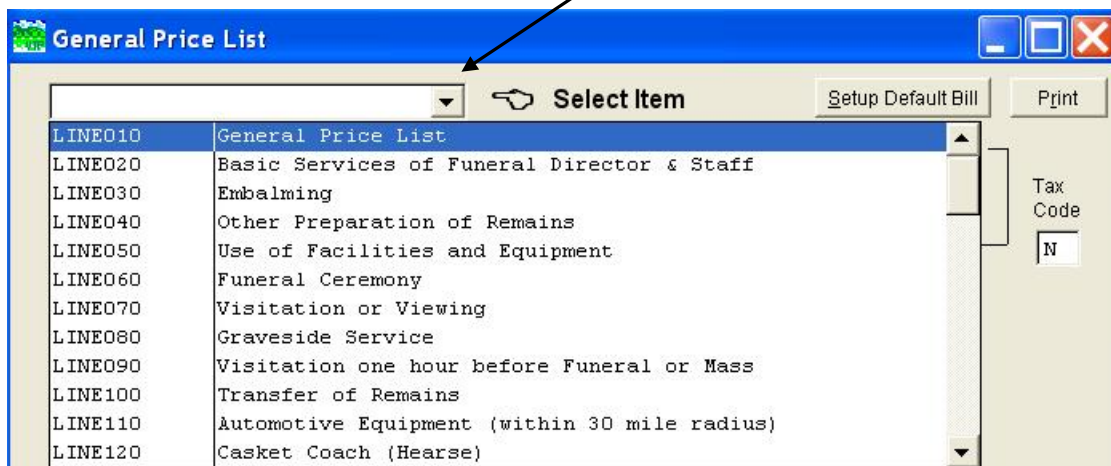
Select Price Lists from the Main TerraPro Menu, and you will see the following screen:

Figure 41 - General Price List Editing Screen

The FTC requires certain language to accompany each item on your price list in order to standardize what families see when making arrangements. This allows comparison shopping, and can work in your favor if you are offering greater value than your competition.

TerraPro uses Item Numbers to uniquely identify every item on your price list. The item numbers **MUST** start with the word LINE followed immediately by a three digit number to indicate in what order the items occur on the price list. We suggest that the items be numbered by 10's, so that you can squeeze another item in between two items if necessary.

To see what you have on the price list, click on the arrow at the top of the screen:



Notice the line number scheme; you should become familiar with it as you edit your price list. Use the mouse or arrow keys to select a price list item to work on. For now, let's choose LINE030, embalming:

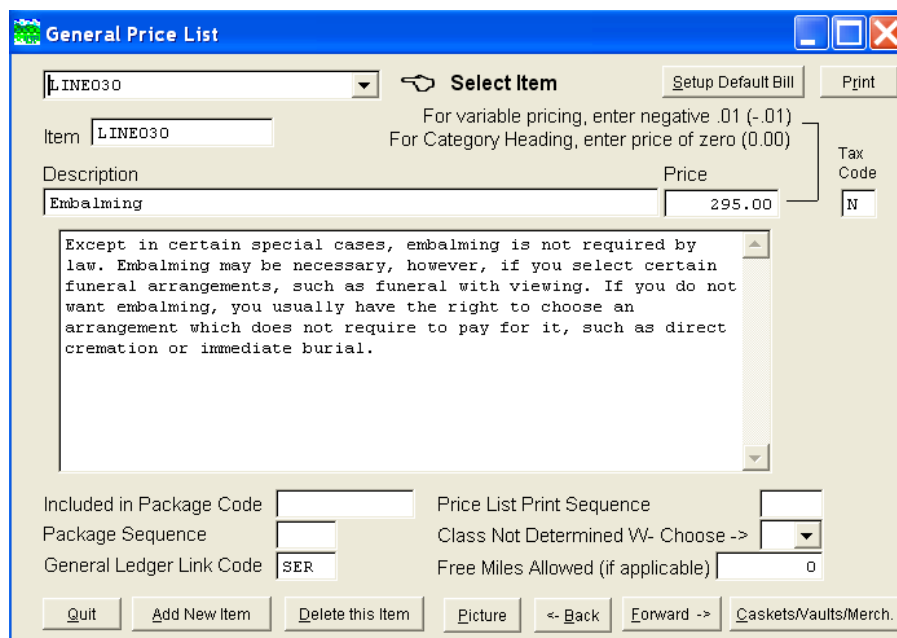


Figure 42 - General Price List - Embalming Item

The **description** is the short description identifying the service or facility charge. The **price** can easily be changed. The **Tax Code** indicates whether or not the item is subject to tax. (N = No, Y = Yes or H = Taxed at half value.) Below the description is the FTC wording required for this item. This may vary according to your preference of the various suggested FTC wordings.

The rest of the items on the General Price List screen have to do with how your price list can be customized:

Included in Package Code allows you to indicate that this item is part of a package. Enter the package number(s) or letter(s) that include this item.

Package Sequence allows the item to appear in the package in a different order than it does on your General Price List.

General Ledger Link Code allows the item to be linked to your General Ledger via a code which indicates what accounts are effected by the sale of this item. Typically this is used when linked to the SBT Accounting Software.

Price List Print Sequence allows you to print items in a different order on a special price list you may have. For instance, although your package prices may be further down on the General Price List Item numbers, you could list them first when you print the price list.

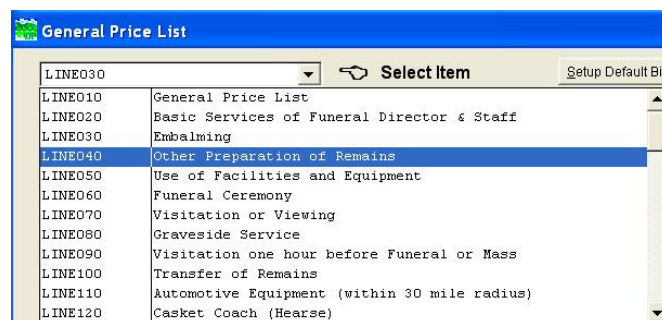
Class uses standard classifications like Services of Staff, Facilities, Livery, Merchandise, etc. to generally code the price list items. This is VERY IMPORTANT to determine, as items without a class will not show up on pull downs located on the billing screen.

Free Miles Allowed is for Automotive or Livery Charges that you wish to impose a limitation on the number of miles radius that you provide the service before charging additional mileage charges.

Adding New Items

The button labeled **Add New Item** can be used if you want to add a new charge to your price list. **Before you hit this button**, you need to know where in the price list the item will appear. Take a look again at the pull-down list of General Price List items, and determine a number that falls between two others where you want to insert the item.

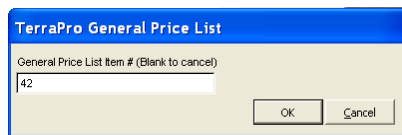
For purposes of example, let's assume you want to add Hairdressing as one of the chargeable items under Other Preparation. Pull-down the list to see what numbers are used:



The screenshot shows a software window titled "General Price List". At the top, there is a dropdown menu currently showing "LINE030", followed by a "Select Item" button with a magnifying glass icon, and a "Setup Default Bill" button. Below these is a list of items, each with a line number and a description. The item "LINE040 Other Preparation of Remains" is highlighted with a blue background. The list continues with LINE050, LINE060, LINE070, LINE080, LINE090, LINE100, LINE110, and LINE120.

Line Number	Description
LINE030	General Price List
LINE020	Basic Services of Funeral Director & Staff
LINE030	Embalming
LINE040	Other Preparation of Remains
LINE050	Use of Facilities and Equipment
LINE060	Funeral Ceremony
LINE070	Visitation or Viewing
LINE080	Graveside Service
LINE090	Visitation one hour before Funeral or Mass
LINE100	Transfer of Remains
LINE110	Automotive Equipment (within 30 mile radius)
LINE120	Casket Coach (Hearse)

Other Preparation is LINE040 and the Use of Facilities Header is LINE050. Let's use LINE042 for our Hairdressing Charge. That way, if we want to add other preparation charges, we can use 43-49 for them. Now click on the Add New Item button. All you have to do is type the number, TerraPro will add the correct formatting.

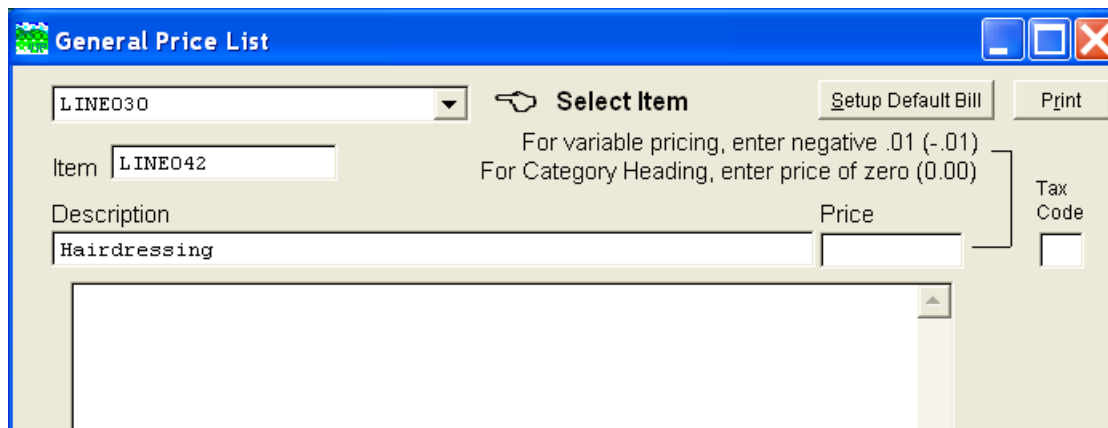


TerraPro General Price List

General Price List Item # (Blank to cancel)

42

OK Cancel



General Price List

LINE030 Select Item Setup Default Bill Print

Item LINE042 For variable pricing, enter negative .01 (-.01)
For Category Heading, enter price of zero (0.00)

Description Price Tax Code

Hairdressing

Figure 43 - New item Added to General Price List

Notice that Item LINE042 has been added. You can type any description you like, but for purposes of illustration we are showing the word Hairdressing. You can choose any price you like, and depending on your state sales tax code, determine whether the service is taxable or not.

VARIABLE PRICING	Because the FTC allows some General Price List Items to have a range of prices (such as the casket and vault), we can indicate this by entering a negative penny (-.01) into the price field. Then the price list will print the word “Variable” whenever it encounters this coded price.
---------------------	---

CATEGORY HEADINGS	To make a heading, such as “Facilities Charges”, just make the price zero (0.00). When the price list is printed, this line will be formatted as a heading, which will give your price list an easy to read format.
----------------------	---

Casket and Vault Price Lists

TerraPro can handle an unlimited number of caskets on your price list. However, we recommend entering only the caskets you usually use. (The ones on your current Casket Price List)

If you prefer to have ALL caskets from your casket vendor, call TerraPro support to get help with adding an Excel or other electronic format list.

If you use Batesville or Aurora Caskets, and enter Batesville or Aurora as the vendor, TerraPro can link to the E-Litho or Digital Litho programs from those vendors to use the vendor supplied pictures, descriptions, etc.

Printing Price Lists

The FTC funeral rule states that you must have your price lists available for public inspection. These include the General Price List and Casket and Vault Price Lists.

TerraPro comes with a standard format for price list printing, but you can choose from several formats, or have our staff design one to fit your needs.

Default Bills

The word default, when applied to computer programs, means the data that shows up automatically, without having to enter it. Usually this data is provided by the programmer, who anticipates this data based on other data you may have entered.

Default Bills can be very useful. The charges that you normally use can be setup in advance so that when you are entering a bill, you don't have to enter these charges. Of course, you can modify any bill to add or subtract charges, so the Default Bill (or Billing Template) is merely a tool to make your job easier.

You can have as many Default Bills as you like. For example, you can have a bill setup for Direct Cremations or one for Immediate Burials. Perhaps you sell package plans, where the charges are all included in a package price. Here is how you setup those templates.

SETTING UP DEFAULT BILLS

Make sure you are on the General Price List screen (select Price Lists from the Main TerraPro Menu). Then click on the button at the top that says "Setup Default Bill". You will see the following screen:

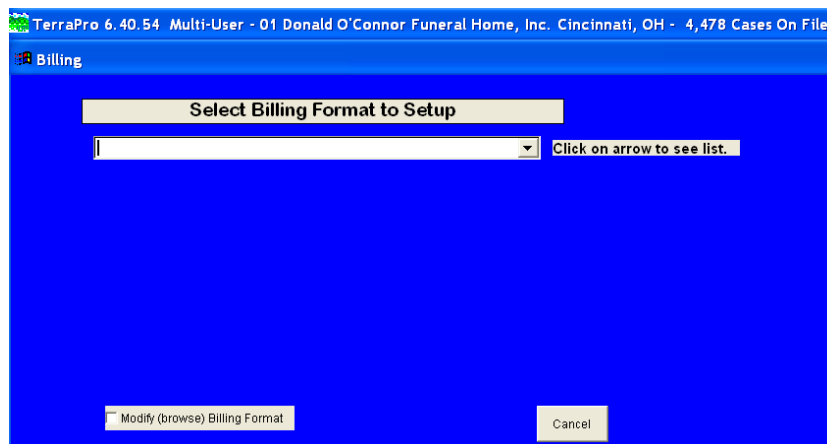


Figure 44 - Setup Default Bills

This screen has only a few choices. You can decide to Cancel, and leave it. Or you can use the mouse to pull-down a list of existing formats. (We'll get to the other button in Appendix A – Behind the Scenes)

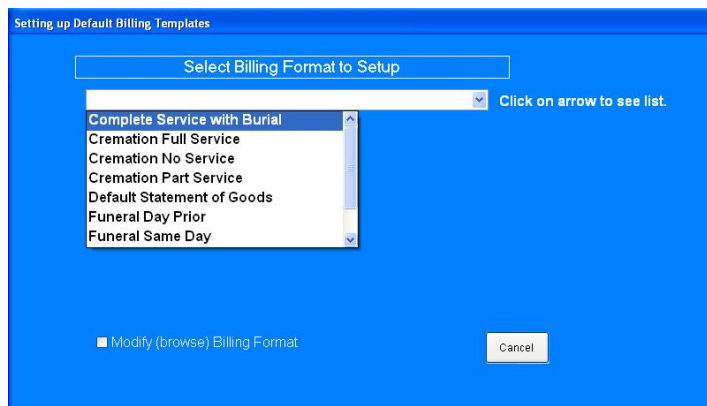


Figure 45 - Billing Format Drop Down List

The above screen shows one possible setup, with different default bills for different funeral types.

Selecting Funeral Day Prior, we see the following:

Setting up Funeral Day Prior

Professional Services			Price	Tax	Qty	Merchandise	Price	Tax	Ext	
1	Basic Services of Funeral Director	1562.00	<input type="checkbox"/> 0.00			Casket	0.00	<input checked="" type="checkbox"/> Y (6.50%)		
1	Embalming	436.00	<input type="checkbox"/> 0.00			Vault	0.00	<input checked="" type="checkbox"/> Y (6.50%)		
1	Other Preparation of Remains	208.00	<input type="checkbox"/> 0.00		1.00	Acknowledgment cards (100)	35.00	<input checked="" type="checkbox"/> Y (6.50%)	\$ 35.00	
0		0.00	<input type="checkbox"/> 0.00		1.00	Register/Attendance Books	75.00	<input checked="" type="checkbox"/> Y (6.50%)	\$ 75.00	
0		0.00	<input type="checkbox"/> 0.00		1.00	Memorial Folders/Prayer Cards	50.00	<input checked="" type="checkbox"/> Y (6.50%)	\$ 50.00	
0		0.00	<input type="checkbox"/> 0.00		0.00		0.00	<input type="checkbox"/> 0.00	\$ 0.00	
0		0.00	<input type="checkbox"/> 0.00		0.00		0.00	<input type="checkbox"/> 0.00	\$ 0.00	
0		0.00	<input type="checkbox"/> 0.00		0.00		0.00	<input type="checkbox"/> 0.00	\$ 0.00	
Facilities			\$ 2,206.00		Cash Advances					\$ 160.00
4	Viewing/Vistation (Per Hour)	75.00	<input type="checkbox"/> 0.00		0.00		0.00	<input type="checkbox"/> 0.00	\$ 0.00	
1	Funeral Ceremony	370.00	<input type="checkbox"/> 0.00		1.00		0.00	<input type="checkbox"/> 0.00	\$ 0.00	
0		0.00	<input type="checkbox"/> 0.00		0.00		0.00	<input type="checkbox"/> 0.00	\$ 0.00	
0		0.00	<input type="checkbox"/> 0.00		1.00	Certified Copies of Death Certificate	10.00	<input type="checkbox"/> 0.00	\$ 10.00	
0		0.00	<input type="checkbox"/> 0.00		1.00	Burial Transit Permit	3.00	<input type="checkbox"/> 0.00	\$ 3.00	
Automotive			\$ 670.00		0.00	Flowers	0.00	<input checked="" type="checkbox"/> Y (6.50%)	\$ 0.00	
1	Transfer of Remains	238.00	<input type="checkbox"/> 0.00		0.00	Cemetery	0.00	<input type="checkbox"/> 0.00	\$ 0.00	
1	Funeral Coach (Hearse)	254.00	<input type="checkbox"/> 0.00		0.00	Death Notices	0.00	<input type="checkbox"/> 0.00	\$ 0.00	
1	Flower/Utility Vehicle	107.00	<input type="checkbox"/> 0.00		0.00	Clergyman	0.00	<input type="checkbox"/> 0.00	\$ 0.00	
1	Limousine	137.00	<input checked="" type="checkbox"/> Y (6.50%)		0.00		0.00	<input type="checkbox"/> 0.00	\$ 0.00	
0		0.00	<input type="checkbox"/> 0.00		0.00		0.00	<input type="checkbox"/> 0.00	\$ 0.00	
Other Services			\$ 736.00		0.00		0.00	<input type="checkbox"/> 0.00	\$ 0.00	
0		0.00	<input type="checkbox"/> 0.00		0.00		0.00	<input type="checkbox"/> 0.00	\$ 0.00	
Alternative Services			\$ 3,612.00		0.00		0.00	<input type="checkbox"/> 0.00	\$ 0.00	
0		0.00	<input checked="" type="checkbox"/> Y (6.50%)		Total Amt of Bill				\$ 13.00	
									\$ 3,804.31	

Total Taxable Amount 297.00
Change Tax Rate Tax Rate 6.50%
Total Tax 19.31

Figure 46 - Setting up Default Statment of Goods

This screen contains the charges that will appear for a standard funeral with a prior day visitation. Editing this screen looks and feels exactly like editing a bill for a specific client, but only serves the purpose of determining the standard and usual charges which will appear on a bill when first created.

To edit this screen, click on any item. You can type a different price, or right-click or press the function key labeled F3 to choose a different service from the General Price List. Pressing Enter on the price will jump to the next item, where you can leave things as they are or change or add another item. The key to using this screen is organization: you must first setup your General Price List to reflect the actual way you do business. Secondly, you must bring those charges onto the screen.

ITEMIZING
VS.
PACKAGES

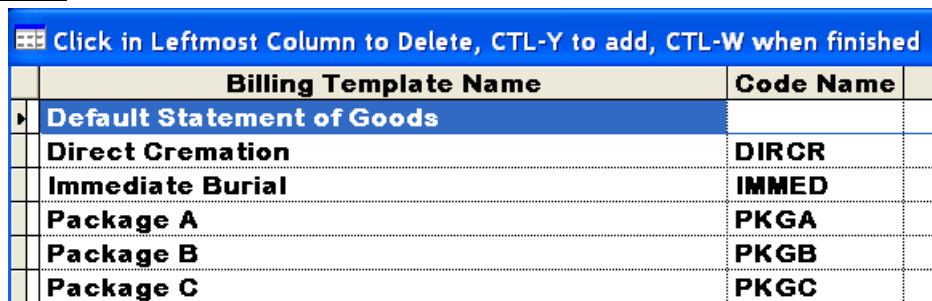
Whether you itemize every charge or simplify your billing by grouping services into Package Plans, you must follow FTC regulations throughout the process. By itemizing, you are essentially doing your billing the same way the FTC requires you to do your Price Lists. When you package your services together, it might be necessary to explain in writing using a Statement of Goods and Services to explain what is included in each charge. Either way works in TerraPro, so feel free to choose whichever suits your way of doing business.

TerraPro supports “Itemized Packages”, such as the screen on the previous page. Right clicking on any item adds that item to the package, and when the bill is printed, it can show the package price by totaling those items. This gives you complete freedom in setting up and modifying package pricing.

It is usually a good idea to work with TerraPro consultants to assure the way you have configured your price list will produce the results you wish. For example, if your accountant requires reports regarding the quantity and dollar value sold of each of your price list items, you probably will have to itemize on the bills so the sales data is available. On the other hand, if the sales journal just needs to summarize services, automotive, merchandise and cash advances, a one line package price can provide this information.

ADDING
DEFAULT
BILLS

When setting up the Default Bills for the other offerings, such as Direct Cremation, just change the items included on that particular type of funeral. To add other default bills, right click on the pick list arrow. Then follow the on-screen directions, making sure to give each default bill a 4-5 character code.



Click in Leftmost Column to Delete, CTL-Y to add, CTL-W when finished	
Billing Template Name	Code Name
Default Statement of Goods	
Direct Cremation	DIRCR
Immediate Burial	IMMED
Package A	PKGA
Package B	PKGB
Package C	PKGC

Figure 47 - Adding More Default Bills

Notice that the Default Statement of Goods MUST be present, and that it gets NO Code Name.

After adding the definitions similar to the above format, you can setup each default bill as you like.

NOTES:

[illegible]

Billing

TerraPro is a complete Accounts Receivable System. Billing is the heart of this system, and allows you to present Statement of Goods, Invoices, Monthly Statements and Contract Forms. In addition, once a bill is entered, it automatically appears on the Accounts Receivable Report, in addition to your Sales Journal and Sales Tax Reports.

If you have completed Chapter 8, Price Lists, you are already an expert at doing billing. If you setup your Default Statement of Goods, you will have a template from which all bills can be created. Your standard and usual charges will appear automatically on each bill, but can be changed, added to, deleted or prices modified at will.

Clicking on the Edit Bill Menu choice on the Main TerraPro Menu will produce one of three results:

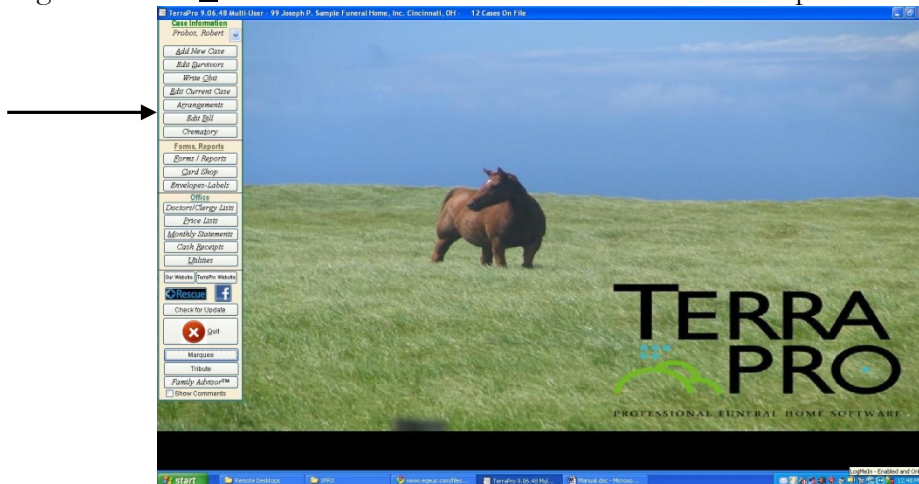


Figure 48 - Choose Edit Bill from Main TerraPro Menu

1. You will be taken directly to a previously entered bill for this case.
2. You will be asked to choose which billing format to use, then taken to the bill editor.
3. You will be denied access because you have not determined who will pay the bill.

NO PERSON
RESPONSIBLE
ENTERED

time. See example below:

Let's look at result 3. Although the informant is usually responsible for the bill, this is not always the case. For example, if the case was a Pre-need, a trust account may be the person responsible. No matter whom it is, that person or entity must be identified before a bill can be entered. If you don't know who will be responsible, just assign a PR code to any survivor, remembering that it can be changed at any

Survivors File for Anthony J. Alfieri - Case # 1594-026

Survivor Information Post Service Followup Letters

Family Relationship to Deceased: SP Other Relationships (use 2 letter codes) IN PR FL

Title First Middle Last Sex
Mrs. Claire M. Alfieri F

Salutation: Date Married: 1/1 Marriage Info: merr

P.O. Box/Apt: Maillist Codes: List with Survivors

Street & #: 6835 Whitehall Avenue

City: Cincinnati County: Hamilton Twp: ZIP: 45230

Evening or Home Phone: 513-231-7177 Daytime or Work Phone: FAX or Cell Phone:

Delete Choose Survivor New

Browse/Add Save & Quit

Figure 49 - Spouse Record - Note PR code in Other Relationships

If later you need to change the Person Responsible (PR) code, remove it from one survivor and place it on another. Although there could possibly be more than one Person Responsible, at this time TerraPro can only address a bill to one person responsible. If you need to send a bill to two parties, the work-around would be to print the bill, then change the person responsible, and print it again. You would have to manually indicate the amount each person was to pay, if needed.

CHOOSE
BILLING
FORMAT

want:

If no bill has yet been started for this case, you can choose which billing template to use. See Chapter Nine for details. You can have an unlimited number of default (pre-set) bills covering Direct Cremations, Immediate Burials, Memorial Services, etc. that will simplify billing. Choose the format you want to use by clicking on the arrow at the end of the pull-down list, and then clicking on the billing format you

Billing

Choose Billing Format you wish to use:

Default Statement of Goods Direct Cremation Immediate Burial Package A Package B Package C

Click on arrow to see list.

Modify (browse) Billing Format Use Blank Bill Cancel

Figure 50 - Choosing a Billing Format

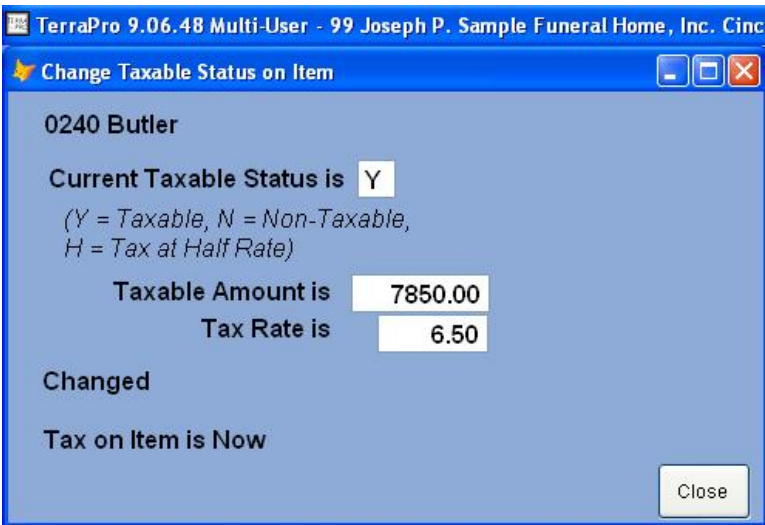
EDIT BILL

Figure 51 - Billing Screen

You can Enter the Price if you need to change it. For even-dollar amounts like \$395, just enter 395 and press tab or enter. You don't need the decimal OR the dollar sign. It is best if your cursor is at the beginning of the price entry box, not somewhere in the middle, so try to get into the habit of using the TAB or ENTER key to move around the screen, saving the mouse for big jumps.

Most items are assumed to be a quantity of one. For some items, however, it might make sense to indicate a quantity; for example, death certificates or memorial folders. Even if you price by boxes of 25 or 50 cards, you may need to indicate 2 or more boxes. If you want to indicate how many were sold, Click on the spinner at the left of the description to Change Quantity. **Hint:** For a No Charge Item, enter a Quantity of 1, Price of Zero. The item will show “*No Charge*” on the bill. **EXCEPTION:** For Casket and Vault, entering a description without a price will allow you to define which casket was used in a package price which includes a casket. (Version 9.00.36 or higher)

Toggle Tax Occasionally, you may have to change the tax as charged on a given item. To change it, click the check box to the right of the price and you will see this screen:



You may then choose to make the item taxable, non-taxable or taxable at half value. When you do, you will be shown the tax amount calculated on the item. Closing this window will update the totals on the bill, and the total tax. You may also change the taxable amount of the item if it is different than the price charged. For example, the casket price can include the entire funeral service, so you should change the taxable amount to the appropriate figure to tax the items that are included in the package that are taxable.

C O M M E N T

You can add a comment to a bill by filling in the comment area. You may need to contact TerraPro personnel to add this comment to your custom invoices.

Let's explore the buttons at the bottom of the billing screen:

\$ P A Y M E N T

As payments are made toward this bill, they are entered using the payment screen. To access this screen, click on the \$Payment button. You will see this screen:

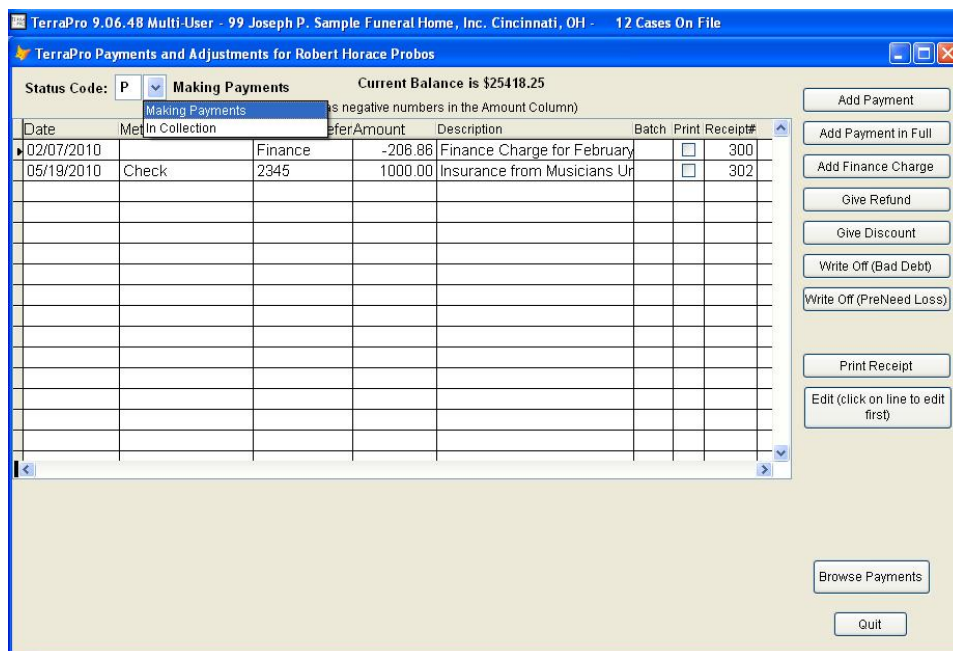


Figure 52 - Payment Entry Screen

Any of the previously entered payments can be edited from this screen, or new ones can be added. Click on Add Payment or one of the other buttons to add Finance Charges, Refunds or Discounts. Pull down the Status list to choose a status for this bill. (optional)

The **finance charge** is calculated on the monthly finance charge percentage rate entered into your setup when TerraPro was first installed. If you need to change it, select Utilities, Setup, and change the percentage rate. As with other entries, you have the opportunity to Save, Edit or Cancel.

By default, the **refund** amount is the balance remaining on the bill. Since most refunds are issued on a disputed amount, this is the most likely amount. Of course, the amount can be edited.

Once again, the discount amount is the balance on the bill. Occasionally, you may find the need to adjust a Pre-need bill downward to match the contract amount, or to discount the entire bill or a certain item. Enter the date, amount and description and an account number if linked to SBT.

Deleting an entry is done by clicking in the leftmost column. Make sure the line says DELETED once you have deleted the payment

Click the **Edit Receipts** Button to allow editing of previous receipts on the payment grid.

Receipts can be printed for each payment or for a group of payments. The receipt printer is an extra cost add-on which can be purchased using PayPal (or your own credit card) from this screen. Just click on *Print Receipt* for details.

TAX RATE We see we can adjust the Sales Tax charged on this bill using the Tax Rate button:

Clicking the button labeled Change Tax Rate will highlight the **Tax Rate** box. where you may change the tax rate, or the **Total Taxable Amount**, along with the **Actual Tax Charged**. This is particularly handy when transitioning from a manual to the computer system, as many times the tax is rounded differently when calculated using a calculator. (It has to do with whether a total taxable figure is calculated, then multiplied by the tax rate, or whether each item's tax is added together.)

DATE	The date of the bill can be changed to reflect your wishes in aging this bill. By default, today's date is used when the bill is created. Edit the date as need for proper aging of this bill.
NET DUE DAYS	If you wish to adjust the number of days before the bill is considered past due, change the Net Due Days. This bill will be aged accordingly. (The default net due days is controlled by your setup, under the Utility Menu.)
DO NOT SEND STATEMENT	TerraPro will allow you to send monthly statements automatically (see Utility Menu). However, in some cases you may want to avoid sending out a statement for a particular customer. If so, check this box.
SHOW COSTS	If you have entered your overhead costs (with optional costing module), TerraPro will calculate your gross profit on an individual bill, allowing you to make decisions about your pricing and costs. Click here to see your profit!
ENVELOPES & LABELS	You can print an envelope after printing the bill by clicking here. You can also click on Person Responsible to edit addresses and names.
START OVER	It is possible to erase the current bill and start over if too many lines need changed or the wrong billing format was chosen. Use this option only as a last resort, and never if the bill has already been sent to QuickBooks. (You will need to manually delete the invoice in QuickBooks if you create a new one here.
CHECKLIST	A shortcut to the checklist for this case is provided here for your convenience.
INSURANCE POLICIES	A shortcut to the insurance polices for this case is provided here for your convenience. You can enter the insurance information and print claim forms or proof of death forms from this screen.
LIST ALL INSURANCE POLICIES	A list of insurance polices entered above can be printed to verify information with the informant..
INSTALLMENT OPTIONS	You can set up periodical payments if necessary. A payment book and payment schedule can be printed.

Printing Bills

TerraPro comes supplied with many billing formats, but can be customized to print almost any type of bill you wish. Complete instructions for modifying bills are beyond the scope of this manual, but TerraPro personnel will be happy to assist you in achieving the results you desire.

When you press print, you are presented with a choice as to whether you want to show payments that have been made. Click on the check box if you wish payments to be shown.:

Let's choose Invoice. Next we have a list of possible formats for the bills. These are setup for you when TerraPro is installed but can be added to, deleted or revised.

Format	Amount
Other Services	\$ 500.00
Alternative Services	\$ 3,000.00
Traditional Funeral Service Package	\$ 45,000.00
Total Taxable Amount	\$48,000.00
Tax Rate	7%
Total Tax	\$3,360.00

Figure 53 - Choice of Bill Formats

For now, just choose the Bill with Payments. You will see a bill that looks something like the following:

Joseph P. Sample Funeral Home, Inc.
604 Colby Street
Cincinnati, Ohio 45216

To: Karen Sue Hakola
604 Colby Street
Cincinnati, OH 45216

Statement
January 23, 2003

Service for the Funeral of David Joseph Hakola
Date of Death: February 25, 2002 Date of Service: November 24, 1993

Description	Tax	Amount
Services of Funeral Director and Staff	0.00	600.00
Embalming	0.00	275.00
Encasement	0.00	25.00
Working and distributing remains when no embalming	0.00	50.00
Use of facilities for viewing (per day)	0.00	135.00
Transfer of remains to funeral home	0.00	75.00
Funeral casket of funeral home	0.00	125.00
Luncheon	0.00	100.00
Blue Star/180° Light Blue Casket	0.00	2500.00
817 Brass Vault	0.00	1250.00
Admission/General Card (Per 25 cards)	0.00	15.00
Special Register Book	0.00	50.00
Prayer Cards (per 100)	0.00	15.00
6 Certified Copies	0.00	42.00
Prints Engraving	0.00	45.00
Flowers	0.00	85.00
Cemetery	0.00	150.00
Death Notice	0.00	75.00
Chapman	0.00	50.00
Total Amount of Bill		5772.00
Balance Due		211.56
Grand Total		5983.56

Finance Charges

Description	Amount
11/11/1993 November Finance Charge	19.41
01/01/1994 December Finance Charge	15.00
Total Finance Charges	34.41


Payments

Description	Amount
02/23/1993 On Account - Karen Hakola 2242	-4000.00
02/26/1993 Jan Hakola - Life Savings 0980	-500.00
02/28/1993 On Account - Karen Hakola 3453	-4500.00
02/28/1993 Sonoma's Bank 23987	-10.00
02/02/1993 Insurance Proceeds - Child Services 09833	-2000.00
02/02/1993 On Account - Karen Hakola 4156	-4000.00
Total Payments	-16000.00

Balance Due March 28, 2003 **\$1,772.00**

Figure 54 - Standard Invoice

You can preview each of the billing formats provided to understand the differences in each. If you don't check the detail payments box, the payments will be summarized:



Joseph P. Sample Funeral Home, Inc.
 6404 Coffey Street
 Cincinnati, Ohio 45230

Statement
 January 23, 2003

To: Karen Sue Haldeman
 6404 Coffey Street
 Cincinnati, OH 45230

Services for the Funeral of David Joseph Haldeman
 Date of Death: February 26, 2002 Date of Service: November 24, 1993

<u>Payments</u>	
Services of Funeral Director and Staff	600.00
Embalming	275.00
Hair Dresser	35.00
Waxing and disinfecting remains when no embalming	50.00
Use of facilities for viewing (per day)	50.00
Use of facilities for funeral service	125.00
Transfer of Remains to Funeral Home	75.00
Funeral Casket at Funeral Home	125.00
Limonade	100.00
Blue Mist/IFG/Light Blue Casket	2399.00
SBT Burial Vault	1250.00
Acknowledgment Cards (Per 25 cards)	15.00
Special Register Book	50.00
Prayer Cards (per 100)	15.00
6 Certified Copies	45.00
Police Report	45.00
Flowers	85.00
Cemetery	150.00
Death Notices	75.00
Chaplain	50.00
Total Payments	5772.00
Balance Due March 26, 2002	10.47

Figure 55 - Detail Invoice, Summarized Payments

Next let's look at Statements. Click on the button labeled Statement of Goods. You will see this dialogue box::

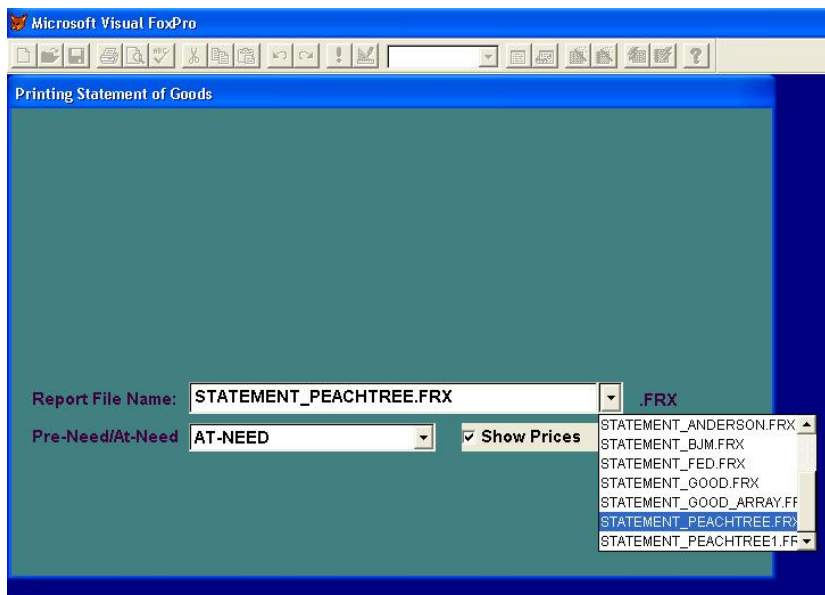


Figure 56 - Statement of Goods Dialogue Box

This screen allows you to choose the Statement of Goods format to be used (if left empty, STATEMENT.FRX is used). The Pre-need Funeral Contract separates the Guaranteed and Non-Guaranteed items. Uncheck the Show Prices box if you want a blank form to use at the arrangements conference.

There are several formats supplied with TerraPro, and others are available:

Joseph P. Sample Funeral Home, Inc., Inc.
6404 Coffey St
Cincinnati, Ohio 45230
513/484-9729

DATE January 26, 2007 SERVICE NO. 2007-850
DECEASED NAME David Joseph Haldeman
DATE OF DEATH April 1, 2008 PLACE OF DEATH St. Joseph Hospital

Charges are for only those items that you selected or that are required. If we are required by law or a cemetery or crematory to use any items, we will explain in writing below. If you selected a funeral which required embalming, such as a funeral with viewing, you may have to pay for embalming. You do not have to pay for embalming you did not approve if you selected arrangements such as a direct cremation or immediate burial. If we charged for embalming, we will explain the reason below.

STATEMENT OF FUNERAL GOODS AND SERVICES SELECTED

A. CHARGE FOR SERVICES

1. PROFESSIONAL, FACILITIES, and AUTOMOTIVE

Basic Services of Funeral Director & Staff.....	\$1,562.00
Embalming.....	\$436.00
	\$208.00
Viewing/Vistation (One Day).....	\$375.00
Funeral Ceremony.....	\$370.00

Transfer of Remains to funeral home/mortuary.....	\$160.00
Funeral Coach (Hearse).....	\$254.00
Flower/Utility Vehicle.....	\$107.00
Limousine.....	\$137.00

TOTAL OF SECTION A. SERVICES \$3,609.00

B. CHARGE FOR MERCHANDISE

CASKET:	_____

BURIAL VAULT:	\$1,210.00
Wilbert MONTICELLO.....	_____
Acknowledgment cards (100).....	\$100.00

TOTAL OF SECTION B. MERCHANDISE \$1,410.00

The only warranty on the casket and/or outer burial container sold in connection with this service is the express written warranty, if any, granted by the manufacturer. This funeral home makes no warranty, express or implied, with respect to the casket and/or outer burial expense.

Billing to: Karen Sue Haldeman
6404 Coffey Street
Cincinnati, OH 45230 Home: 513/232-4076 Work: _____

I hereby agree that I have examined the above-stated items and found them to be correct and according to the arrangements requested, and I hereby acknowledge receipt of a copy of this memorandum and agreement. I hereby represent that I have sufficient funds and assets legally available for payment of cash price and hereby agree and covenant, jointly and severally to make payment of \$4,360.79 within 30 days. A late charge of 1.50% per month amounting to 18.00% per year is applied to the unpaid balance beginning 30 days from the date of this agreement. Any additional services or merchandise ordered or requested after the date of this agreement will be considered part of this agreement and the cost thereof will be reflected on the final statement. I acknowledge that I have received the general price list and have been offered for review the casket price list and the outer burial container price list.

Signed _____ Date: _____
Co-signed _____ Date: _____
Name of funeral home representative _____

C. SPECIAL CHARGES

Forwarding of Remains to Another Funeral Home.....	_____
Receiving of Remains from Another Funeral Home.....	_____
Direct Cremation (as selected).....	_____
Immediate Burial (as selected).....	_____

TOTAL OF SECTION C. SPECIAL

D. CASH ADVANCES

3 Certified Copies of Death Certificate.....	\$30.00
Burial Transit Permit.....	\$3.00

Newspaper Notices.....	\$426.00
Clergy.....	\$100.00
Telephone Charges.....	\$76.39
Transportation Charges.....	\$100.00

TOTAL OF SECTION D. CASH \$735.39

SUMMARY OF CHARGES

A. CHARGES FOR SERVICES.....	\$3,609.00
B. CHARGES FOR MERCHANDISE.....	\$1,410.00
C. SPECIAL CHARGES.....	\$0.00
D. CASH ADVANCES.....	\$735.39
E. SALES TAX, IF APPLICABLE.....	\$91.65
TOTAL FUNERAL HOME CHARGES.....	\$5,846.04

LESS CREDITS & PREPAYMENTS

TOTAL CREDIT APPLICABLE \$1,485.25

TOTAL BALANCE DUE..... \$4,360.79

If any law, cemetery or crematory requirements have required the purchase of any of the items listed above the law or requirement is explained below:

Cemetery requires outer container

Reason for embalming _____
Family request

Relationship to Deceased _____
Relationship to Deceased _____
Initials _____

Figure 57 - Statement of Goods and Services

A Pre-Need contract looks like this, with Guaranteed and Non-Guaranteed items separated:

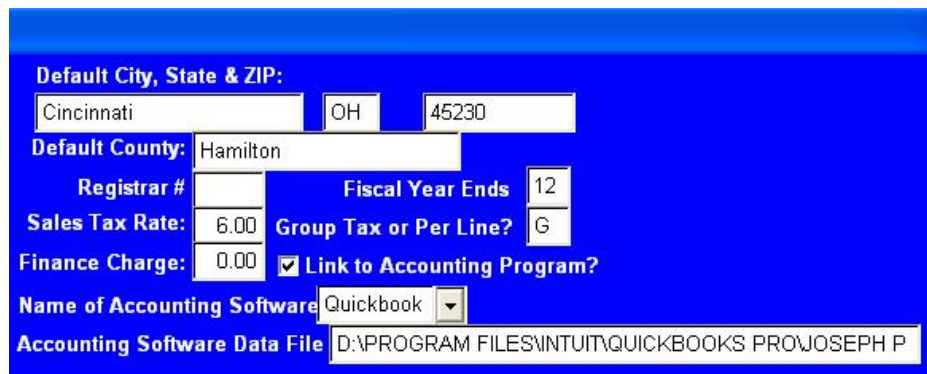
Joseph P. Sample Funeral Home, Inc., Inc.		
6404 Coffey St Cincinnati, Ohio 45230 513/484-9729		
PRE-NEED FUNERAL CONTRACT		
Arrangements For: <u>David Joseph Haldeman</u> Date <u>January 26, 2007</u> Arranged by: _____		
GUARANTEED ITEMS		TOTAL 1310.00
1. SERVICES SELECTED		
Basic Services of Funeral Director & Staff	1562.00	
Embalming	436.00	
Other Preparation of Remains	208.00	
Viewing/Vistation (One Day)	375.00	
Funeral Ceremony	370.00	
Transfer of Remains to funeral home/mortuary	160.00	
Funeral Coach (Hearse)	254.00	
Flower/Utility Vehicle	107.00	
Limousine	137.00	
TOTAL		3609.00
2. ALTERNATIVE SERVICE SELECTION		
TOTAL		0.00
3. MERCHANDISE SELECTED		
V37 DaVinci Bronze Casket	0.00	
Wilbert MONTICELLO	1210.00	
Acknowledgment cards (100)	100.00	
Register/Attendance Books	0.00	
Memorial Folders/Prayer Cards	0.00	
Register/Attendance Books	0.00	
Visual Tribute Program (included with Complete Service)	0.00	
Additional Prayer Cards	0.00	
Clothing	0.00	
4. CASH ACCOMMODATION ITEMS		
Certified Copies of Death Certificate	10.00	
Burial Transit Permit	3.00	
Flowers	0.00	
Cemetery	0.00	
Newspaper Notices	426.00	
Clergy	100.00	
Telephone Charges	76.39	
Transportation Charges	100.00	
Paid in Advance	1485.25	
TOTAL		2200.64
SUMMARY		
TOTAL FUNERAL HOME CHARGES	5019.00	
SALES TAX	91.65	
TOTAL CASH ADVANCES	735.39	
GRAND TOTAL	5846.04	
ADDITIONS/CREDITS		
10/25/2007 From Howard	200.00	
10/25/2007 From Mary Hecker Estate	300.00	
10/25/2007 From Ivaloo Hemmerly Estate	400.00	
DISCLOSURES:		
If you selected a funeral that may require embalming such as a funeral with viewing, you may have to pay for embalming except in certain cases, if any. You do not have to pay for embalming you did not approve if you selected arrangements such as direct cremation or immediate burial. If we charge for Reason for Embalming: Length of Time, Viewing		
The cemetery requires the use of a concrete of steel outside burial container. The crematory requires the use of a casket or an alternative container.		
TERMS AND CONDITIONS		
When all goods and services that have been contracted as part of your specific Pre-Need plan have been paid in full, said goods and services will be initialized into a Homesteaders Life Insurance Company Pre-Need Policy.		
Joseph P. Sample Funeral Home, Inc. will then guarantee the price of those specific goods and services at the time the pre-arrangement is made. THIS DOES NOT PERTAIN TO CASH ADVANCED ITEMS DUE TO THE FACT THE FUNERAL HOME DOES NOT CONTROL THOSE CHARGES.		
All cash advanced items, which are charges that originate outside the funeral home are NON-GUARANTEED ITEMS. These costs are put into a separate Homesteaders Pre-Need policy under Non-Guaranteed Items and will incur interest over the length of the policy term, but if said costs should exceed the policy's interest growth, additional funds may be due at the time of need. Should interest exceed costs, then a refund of the difference will be issued to the beneficiary of the policy.		
At the time of need, the total GUARANTEED ACCOUNT, including the principal interest, will be transferred to Joseph P. Sample Funeral Home, Inc. These funds are transferred in exchange for guaranteeing the goods and services provided by the funeral home as part of your specific pre-need plan described on the attached itemized memorandum.		
All funds are placed into two Homesteaders Life Insurance Company Pre-Need Policies - one being for Guaranteed goods and services provided by the funeral home; the other being Non-Guaranteed items (also known as CASH ADVANCES) into a second policy.		
The policies are then made irrevocable and said funds may not be removed from the policies until the time of need.		
If any merchandise and/or services are unavailable at the time of need, Joseph P. Sample Funeral Home, Inc. shall furnish merchandise and/or services similar in style and at least equal in quality and workmanship.		
PURCHASER ACKNOWLEDGEMENTS		
I/We hereby agree that I/We have acknowledged the terms and conditions as outlined above. I/We have examined the charges stated and found them to be correct and according to the arrangements requested.		
I/We hereby acknowledge receipt of a copy of the statement of the Funeral Goods and Services selected.		
By His/Her signature on this agreement, the purchaser acknowledges receipt of a current General Price List, a current Casket Price List, a current Outer Burial Container Price List and each of said documents, were made available to Him/Her prior to His/Her selection of services and merchandise.		
This agreement is binding on the Heirs, Administrators, Executors, Successors and assigns of the parties and is subject to the Illinois Funeral or Burial Funds Act under which this funeral home is and will remain licensed and Bonded.		
Billing to:		
Karon Sue Haldeman 6404 Coffey Street Cincinnati, OH 45230 Home: 513/232-4076 Work: 513/232-4076		
ACCEPTANCE: The funeral establishment agrees to provide all services, merchandise and cash advances indicated on this statement.		
By _____ Date: _____		
Coesigned X _____ Date: _____		
Signed X _____		
co-signed X _____		

Figure 58 - Pre-need Contract Statement of Guaranteed and Non-Guaranteed Items

Linking to Other Accounting Software

TerraPro links its Accounts Receivable data to Intuit's QuickBooks™. If you have QuickBooks and would like to link to it, our staff can help you make this happen. If you would like to do-it-yourself, the steps are as follows:

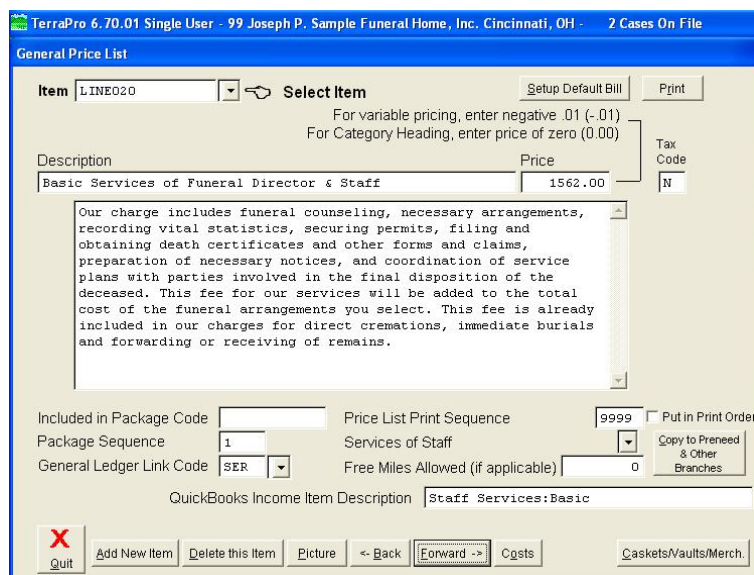
1. Indicate to TerraPro that you want to link to QuickBooks by going to the Utility Menu, Setup and checking the box indicating you want to link to Accounting Software. Choose QuickBooks, and then double click to navigate to the path where the QBW file (your company data in QuickBooks) is installed. If you are on a network, you need to make sure all users have access to that folder. You will also have to setup Sales Tax Rates if your branches charge different sales tax rates.



Default City, State & ZIP:
Cincinnati OH 45230
Default County: Hamilton
Registrar # Fiscal Year Ends 12
Sales Tax Rate: 6.00 Group Tax or Per Line? G
Finance Charge: 0.00 ☒ Link to Accounting Program?
Name of Accounting Software Quickbook
Accounting Software Data File D:\PROGRAM FILES\INTUIT\QUICKBOOKS\PRO\JOSEPH P

Figure 59 - Upper Right Portion of Setup Screen

2. On your General Pricelist Screen, indicate the QuickBooks item name for EACH pricelist item. If you use sub-accounts, separate the names of the accounts with a colon, as shown below.



TerraPro 6.70.01 Single User - 99 Joseph P. Sample Funeral Home, Inc. Cincinnati, OH - 2 Cases On File
General Price List
Item LINE020 Select Item Setup Default Bill Print
For variable pricing, enter negative .01 (-.01)
For Category Heading, enter price of zero (0.00)
Description Price Tax Code
Basic Services of Funeral Director & Staff 1562.00 N
Our charge includes funeral counseling, necessary arrangements, recording vital statistics, securing permits, filing and obtaining death certificates and other forms and claims, preparation of necessary notices, and coordination of service plans with parties involved in the final disposition of the deceased. This fee for our services will be added to the total cost of the funeral arrangements you select. This fee is already included in our charges for direct cremations, immediate burials and forwarding or receiving of remains.
Included in Package Code Price List Print Sequence 9999 Put in Print Order
Package Sequence 1 Services of Staff
General Ledger Link Code SER Free Miles Allowed (if applicable) 0 Copy to Preamble & Other Branches
QuickBooks Income Item Description Staff Services:Basic
Quit Add New Item Delete this Item Picture <- Back Forward -> Costs Caskets/Vaults/Merch.

Figure 60 - Pricelist Screen with QuickBooks Link Activated

3. The Casket, Vault and Other Merchandise Screens also need these item names or the QuickBooks Link will fail:

The screenshot shows the 'Casket Price List' window in TerraPro. The 'Item' dropdown is set to 'CASKET010'. The 'Description' field contains 'Aurora Bronze 718 Angelic'. The 'Price' is '14795.00' and the 'Tax Code' is 'Y'. The 'Exterior' is 'Bronze', 'Color' is 'White/Gold', 'Interior' is 'Velvet', and 'Materials' is 'Velvet Interior'. A photo of a white casket is shown. The 'Class' is 'Class Not Determined W- Choose ->'. The 'Track Inventory' checkbox is checked. The 'Our Cost' is '0.000', 'Qty on Hand' is '1', 'Qty on Order' is '0', 'YTD Qty' is '-1', and 'YTD \$ Sold' is '\$ -14,795.00'. The 'Filename of Image' is 'C:\VTP\IMAGES\CASKETS\AURORA\A1'. The 'General Ledger Link Code' is 'CAS'. The 'QuickBooks Income Item Description' is 'Merchandise:Casket'. The bottom buttons include 'Quit', 'Add New Item', 'Delete this Item', '<-- Back', 'Forward -->', and 'Export to Website'.

Figure 61 - Merchandise Screen - note QuickBooks Income Item Description

4. That is it! Now TerraPro will automatically update QuickBooks whenever you make changes in a bill. Payments and adjustments will also be sent to QuickBooks.

NOTES:

[illegible]

Insurance Policies

*Insurance forms can really slow your day down. Wouldn't it be great to enter the insurance information in one place and then print the appropriate form? **Read on!***



Note:

Not every insurance company's forms are included with TerraPro, but any insurance company's forms can be added. We will show you how to scan a new form, add it to the list of insurance forms, and populate it with the appropriate information

FORMS AND DATA

Anyone who has ever filled out a form (who hasn't?) is familiar with the idea of forms and data. A blank form is filled in with data that you gather and place in the correct areas of the form. Same applies here!

Getting a form into the computer is simple:

- You **use your scanner** (or hire someone to scan the forms for you), save the form as either a *jpg* or *bmp* type file (both work with TerraPro, and so does a *png* file⁴).
- You **add the form** to the TerraPro list of forms
- You modify the form and **add the appropriate data** items.⁵

Turn the page to get started.

WHERE DO I GET FORMS?

Typically, you can call or write an insurance company and ask them to send or fax you a Life Insurance Claim Form. Many insurance companies have their forms online. For example, Standard Insurance Company's Proof of Death Claim Form is available at <http://www.standard.com/eforms/1794.pdf>

⁴ These abbreviations refer to the file extension for a given picture (a file extension is what comes after the period in a filename).

⁵ This is the hardest part, but the most fun once you get the hang of it. TerraPro personnel will be happy to assist you in this step.

If you bring the form up on their website, your browser will give you the opportunity to save the form. For example, if you use Chrome™ as your browser, you move your mouse to the lower right area of the screen and you will see a series of buttons that allow you to print or save the pdf document:

Sample Insurance Form found online with save options in Chrome Browser

If you use Internet Explorer™ as your internet browser, your screen may look like this:

Internet Explorer's save button is at the top of the browser screen.

Regardless of which browser you use, once you save the PDF to your computer, we are ready to convert it to something TerraPro can use.⁶

We mentioned the bmp or jpg format as a file format that can be used as a background for our form design. Converting to those formats can be handled easily by Adobe Acrobat (full version), or some inexpensive pdf converters found on the internet. Here is one we use: <http://www.pdf2bmp.com/> - just upload your pdf and they will convert and send it back as a jpg file.

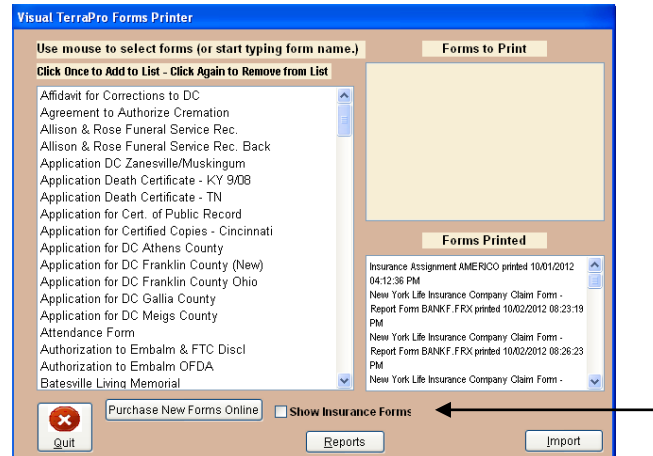
Alternatively, you can scan a printed form into your TerraPro folder and save it as a jpg or bmp file.

⁶ It would be great if FoxPro, which TerraPro is written in, supported a pdf document as a background in our forms, but it doesn't!

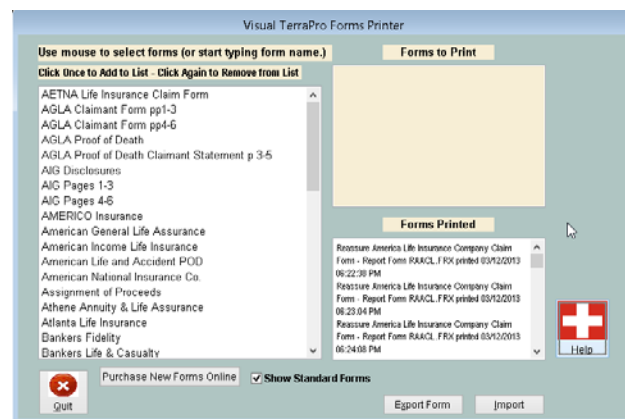
SETTING UP THE FORM

Now we are ready to add the form to TerraPro's forms list. Click on Forms and Reports from the main TerraPro menu:

Choose Show Insurance Forms from the Form Selection Screen:



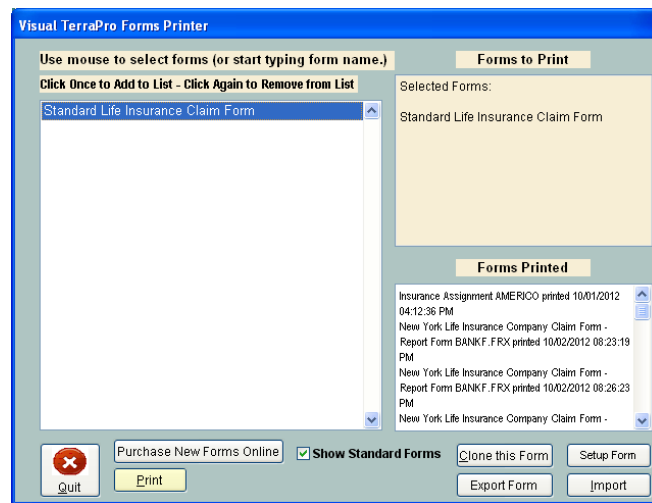
Now you can see any insurance forms that may already be setup in your system.



(If there are no insurance claim forms in your copy of TerraPro, a sample one from Standard Life Insurance is included and you can add it to your list by answering yes to the question that comes up when you choose Show Insurance Forms.)

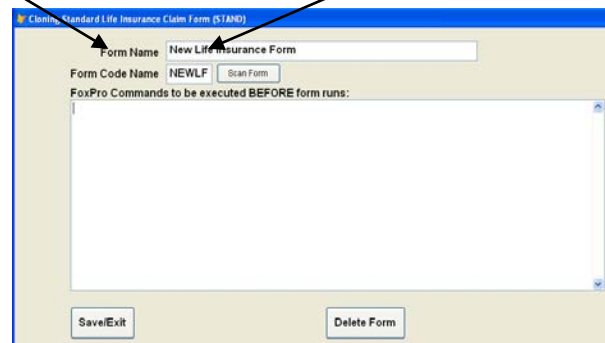
The ONLY way to add a new form is to CLONE (COPY) an existing form that is similar to the one you are creating. This saves you the time of creating a form from scratch.

Click on the form you wish to copy so that it is highlighted:

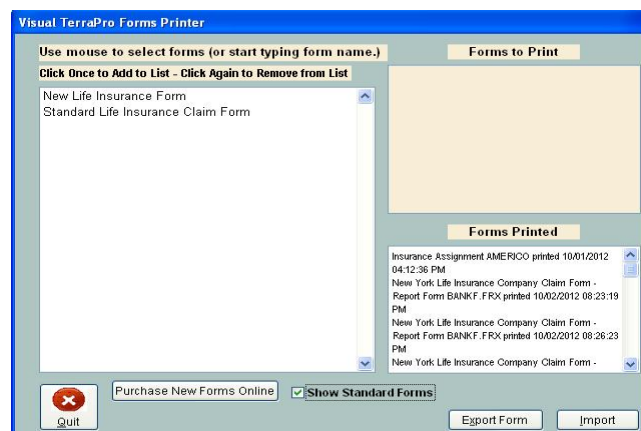


The button to Clone this Form will show up. Click it!

Give the form a name and a 5 character Form Code Name⁷:



After you type the Form Code, the Scan Form button will become visible and you can scan the form from your scanner. It will be saved in your TerraPro folder and will be named after the form code (in this case, NEWLF.bmp) We save in bitmap form so that the form is clear and bright. You can convert it later to any format you want. Ignore the FoxPro Commands unless you know what they should be. Click Save/Exit and the form will be added to your list.



If you **already have insurance forms in your system** and would like to convert them to be on the Insurance Forms list, just highlight the form on your standard forms list, click Setup Form, and change the Type of Form to INSURANCE.

This completes adding forms. You may add other forms, or proceed to the next step to add data to the forms.

⁷ The form code name doesn't matter to us – it is for the computer to use to make sure it has the right form even if you change the name of it. It will be checked to make sure it isn't already in use.

PUTTING
DATA ON THE
FORM

We will now move to the Insurance Screen, where the data for the forms will be added, and the forms modified and printed.

Remember, when we created the forms, we just made copies of existing forms, so the form(s) you created above won't have the correct form or data. That's what we'll do now.

Click the Edit Survivors Button on the TerraPro main menu.

Then click the Insurance Policies Button on the Survivors screen. (The Insurance Policies can be reached from the person responsible/vivor record.)

Now you can see The Insurance Policy Screen:

You can move through the various policies by using the navigation buttons, print a policy, add new policies or edit the existing policy and beneficiary information.

If you have multiple policies from the same insurance company, you can easily add them without retyping all the information. When you click add, just say yes to the question about using current information.

If the insurance company information is not on the pulldown list of companies, right-click the list button to add a new insurance company (**HIGHLY RECOMMENDED**) (see page 23 for more information on how to edit locations such as insurance companies.)

When you print insurance forms, keep in mind that some forms want to list ALL policies, and others want only a specific policy. For this reason, before you print, you will be asked whether you want to show all policies for the deceased, or only this policy. If the deceased has multiple policies with the same beneficiary, you can enter them all on one record, separated by commas.

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Modifying Forms, Reports and Cards

TerraPro has extensive tools to help you create new forms, reports and memorial merchandise. A little study of how these work can pay off with improved productivity and a sense of understanding how the data you have entered can be retrieved.



Warning:

You must be the curious type to be effective at modifying forms, etc. If you have fear of computers or are afraid you might make things worse, this chapter might not be for you. However, if you follow the precautions covered here, there is no reason that anyone cannot learn how to change forms and reports. Learning FoxPro's quirks and tricks is key to becoming proficient in modifying forms and reports.

WHERE'S THE DATA?

One of the questions that bugs users a lot is "What happens to the data when I type it in to the screens?"

The simple answer is that it is stored on the computer's hard drive. For those interested, a hard drive is actually a metal disk inside a case inside your computer box which spins very fast (7200 rpm is not uncommon) and is magnetically charged in tiny, tiny increments into plus and minus electrical charges. These charges can be remembered by the disk because they stay there even when the power is shut down. Starting your computer activates a file access system (Windows) which can also run programs (TerraPro) which can "read" the magnetic charges on the disk and convert them to data, pictures, forms etc. Sounds like magic, doesn't it? The amazing thing is that this data is stored much the same way that telegraph messages were sent in the early part of the twentieth century. Each step along the way, data has remained compatible with the old binary method of coding letters and numbers first established by Western Union!

So much for the GeekSpeak! We don't need to know about binary coding or any of these details, fortunately!

DATA ABOUT
DATA

It is helpful to know, though, about databases, and specifically data tables, which are like phone books: they provide a list of information in a specific order. The advantage to computer data tables is that they can be re-arranged in any order, queried for records that match a certain set of criteria, copied, modified, edited and deleted. So it's like having a phone book that would allow you to look up a name if you knew the phone number, instead of the other way around.

FoxPro is the leading database language used around the world to track information, write programs and reports. Most of the funeral home software available today is written in FoxPro, and for good reason. Its' lightning-fast data retrieval and simple yet powerful programming language make it the ideal choice. Microsoft has a long-term commitment to improving and marketing FoxPro, and although you may not see it for sale in the computer stores, it is behind the scenes in a lot of businesses, tracking inventory, sending direct mail, fulfilling magazine subscriptions. Even the Air Force uses FoxPro! So you are in good company.

HOW IS DATA
STORED?

Data Tables are like ledgers – rows and columns of data tabulated (“table-ized”). Here is an example:

First Name	Last Name	Address	City	State	ZIP
1 David	Haldeman	6404 Coffey St	Cincinnati	OH	45230
2 Karen	Haldeman	6404 Coffey St	Cincinnati	OH	45230
3 Josh	Haldeman	6558 Corbly Rd	Cincinnati	OH	45230
4 Trella	Romine	1536 Whetstone	Caledonia	OH	43314
5 Jed	Haldeman	2476 Adams St.	Columbus	OH	43202

There are five records in this table (data rows). There are six fields (data columns).

HOW IS DATA
RETRIEVED?

When you want to retrieve data, you tell the computer which row to get the data from, and then tell it what column you want to print. For example, the data in row 3, column 3 is *6558 Corbly Rd*.

Retrieving data is easy in TerraPro, because we have done the hard work in the background of making sure that you are looking at the right row of data when you select which case you are working on. Then all you have to do is tell us what column you want to show. We use the term “field” instead of column, but they mean the same thing. Since data is stored in several different tables, it becomes necessary to preface the field name with a table name, like CASES.Last to get the last name from the CASES table. There are tables for survivors, veterans information, billing and files for storing locations, staff members and mailing list recipients. TerraPro takes care of finding the data for you, all you have to do is tell it what data you want printed on a form or report.

FORMS,
REPORTS,
CARDS, BILLS

Although we make a distinction between these types of computer output, they are really all from the same FoxPro Report Designer.

We only call them by different names so that your job of getting the paperwork out is easier. It's called “Divide and Conquer”. If we listed all the forms and reports in one big list, it would be harder to find the report or form you wanted.

Ok, so why call them forms and reports?

A form is usually based on a pre-printed form that used to be manually filled-out by hand or with a typewriter. It typically deals with information for just one case. Forms and Cards are examples.

A report is a list or reporting of data for more than one case: for example a Sales Tax Report will show all the taxable sales and tax collected for a given period.

FOXPRO
REPORT
DESIGNER

FoxPro gives us the ability to use the Report Designer for either type of output.



Let's Do It!

First, we'll take a look at a simple form to see how information shows up on the form, and how we make it show up.

Open TerraPro, if not already open, and go to Forms on the Main TerraPro Screen. You will see a list somewhat like the one below:

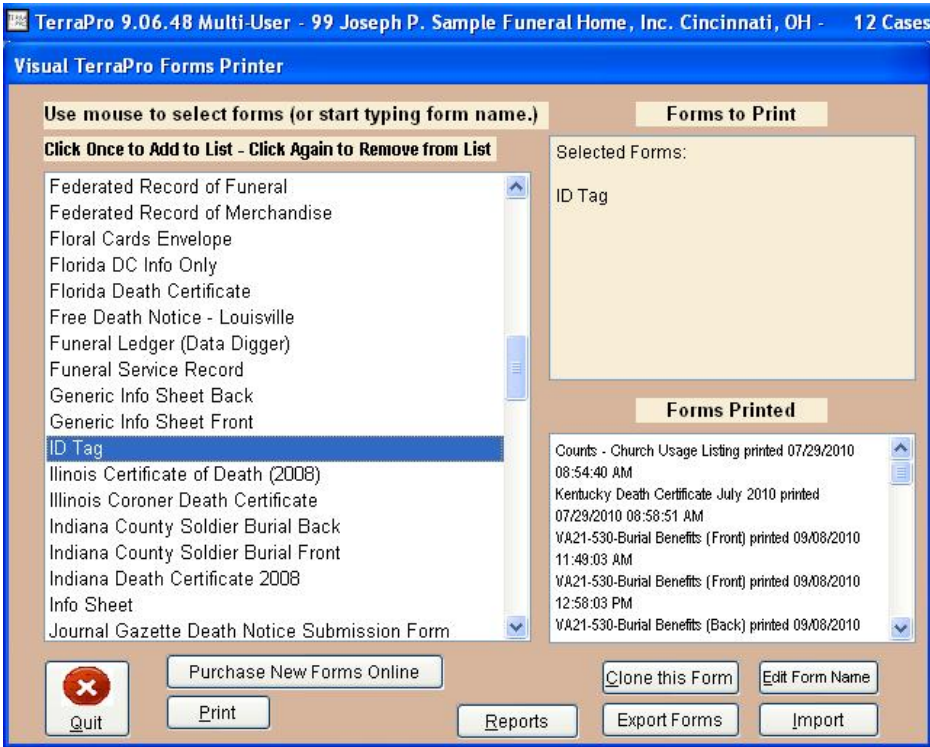


Figure 62 - TerraPro Forms List

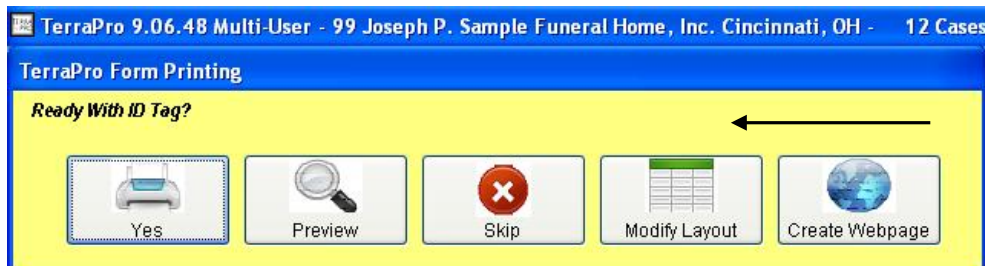
You should have a form called ID Tag. This is the federally required casket id tag that is slipped into a tube on the side of the casket to identify the remains.

When you print it, it looks like this:

Parmelee W. Duffus	
Name of Deceased	
OCT 19 1915	OCT 25 2002
Date of Birth	Date of Death
268-28-1937	
Social Security No.	
Mt. Moriah Cemetery 1	
Cemetery	Plot #
Donald O'Connor Funeral Home, Inc.	
Funeral Home	

Figure 63 - ID Tag

When select a form to print, remember that you are given the choice to Modify:



If you were to choose Modify instead of Preview, you would see the following screen:

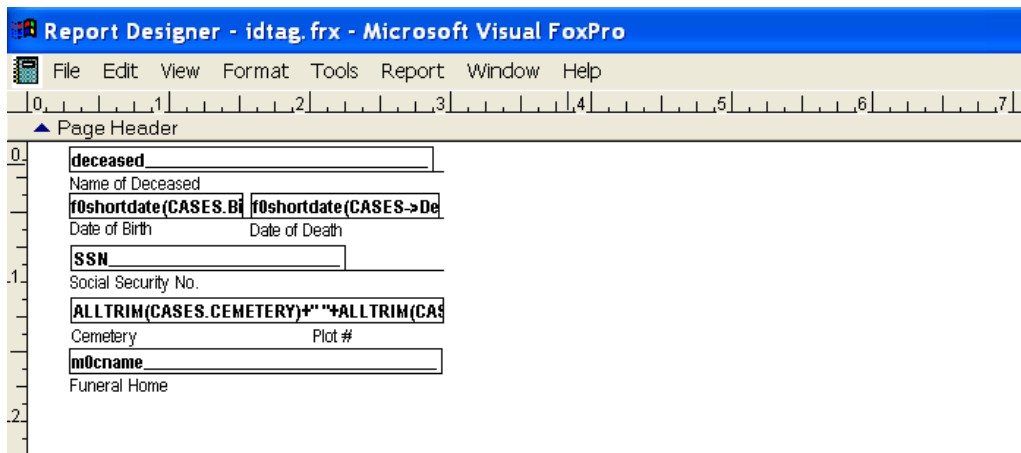
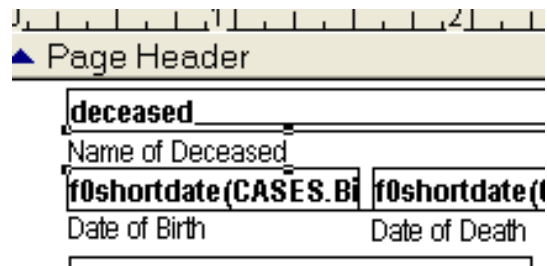
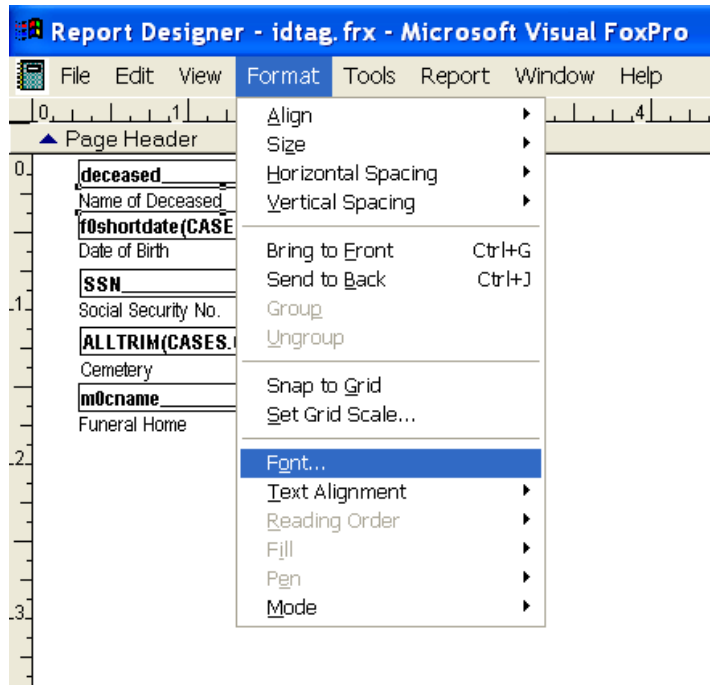


Figure 64 - The FoxPro Report Designer editing idtag.frx

Let's notice some things right away. Compare Figure 75 (above) with Figure 74 (previous page). Some words are the same, such as the captions below the lines. Others seem to be some kind of code. The captions are text, and within TerraPro, cannot be edited. However they can be formatted or deleted. Let's change the caption labeled "Name of Deceased" so that it is bold face type. Click on top of the words "Name of Deceased" and they will be selected. You can tell they are selected because four little "handlebars" appear at the corners of the object. (An object is one of the items shown on the screen, such as deceased, "Date of Birth", etc.)



Now pull-down the Format Menu at the top of the screen by clicking once on it:



When you open the Format Menu, slide the mouse down to highlight the Font choice. Notice that it has an ellipse (...) after it. That means choosing it will bring up more choices. Go ahead and click on it. You will see the Font Dialogue Box.

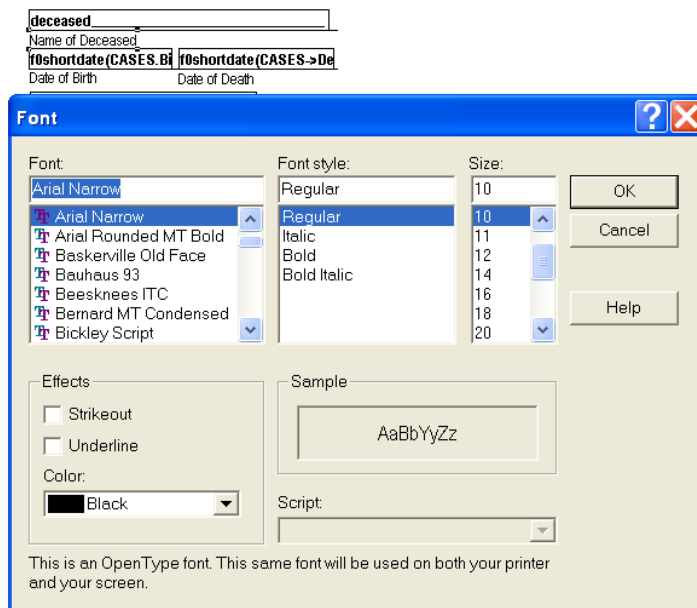


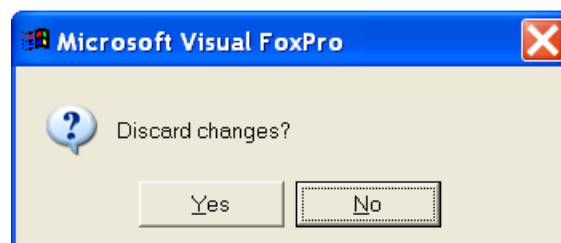
Figure 65 - Font Dialogue Box

There are lots of things about this text object we could change. Each one of them is called a property. For instance the font name could be changed, or the style (regular, italic, bold, bold italic) or we could choose to underline the text, etc. This is just like the font dialogue box in other Windows programs and in fact is a part of Windows, not FoxPro or TerraPro. So if you have used a word processor like Microsoft Word or Word Perfect or Microsoft Works, you probably have used this same box to change fonts.

Let's make a simple change. Click on Bold Italic and then click OK. You will be back at the FoxPro Report Designer and you will see that the caption has changed to look like this: ***Name of Deceased***

Italics make the letters slanted, as you probably were aware. It looks a little strange to have one of the captions in Bold Italics and the others in Regular, but let's take a look at the finished product before we change the other captions.

To save your work, we recommend pressing CTRL-W. This is the fast way to Save and Close at the same time. You could click on File, Save and then File, Close, but why click four times when you can do it all with two keystrokes? Of course, you could just press Escape to indicate you want to leave, and then the program would ask



to which you would have to answer No by clicking on No or pressing N, and then click on File, Save, File, Close anyway. The only time you will use Escape is when you DO NOT want to save your work because you were playing around or made a serious error and want to leave the editing process before things get worse! If you answer Yes to the above question, then none of the changes we made would be saved and everything would be the way it was. It's kind of nice knowing you have an out when learning new things, isn't it?

If you want to save your work in increments, you can press CTRL-S after making a change that you know is right, then continue making other changes, saving only when you know everything is ok..

PREVIEWING
YOUR
CHANGES

You can choose File, Preview to see what your changes will look like BEFORE saving them. This lets you try things without penalty of making a change you don't like.

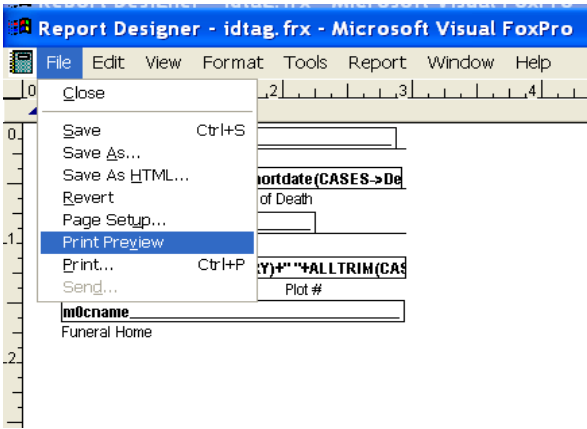
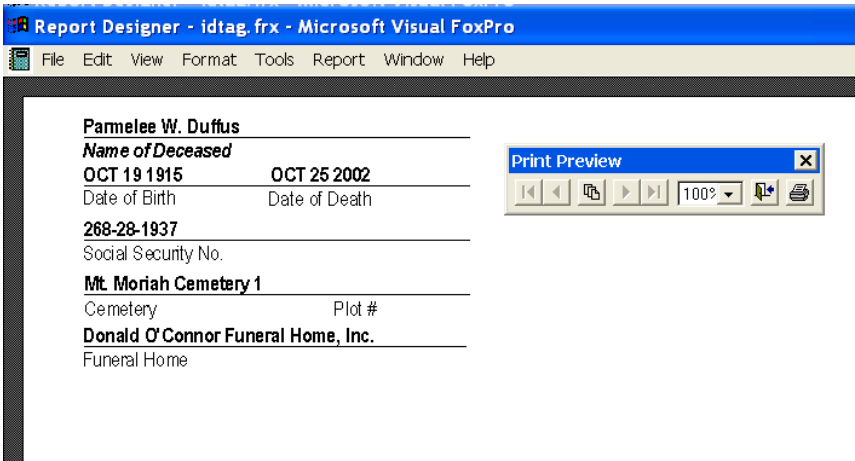




Figure 66 - Previewing before saving

Just like before, click on File, then slide the mouse down to Print Preview and click. You will see a preview of your changes:



This kind of change is called a cosmetic change, because it really doesn't change the data, just the way it looks. It's now up to you to decide if you want all the captions in Bold Italics or revert back to the old way by pressing Escape when in the Report Designer.

WARNING: DO NOT press the Print Icon  shown at the right of the Print Preview box (blue caption with arrows and 100% above). This will cause an ID tag to be printed for everyone in your case file. To end the preview, press ESCape or click on the Exit button 

Let's make another change to this form. Supposing the ID Tag had to be printed with the deceased's last name first, then first and middle, like Doe, John Allen. Or even better, let's say the requirement was that the last name must be UPPER CASE, like DOE, John Allen.

Return to the Modify screen if not already there, following the steps outlined above.

This time, double-click the box with the word deceased in it.

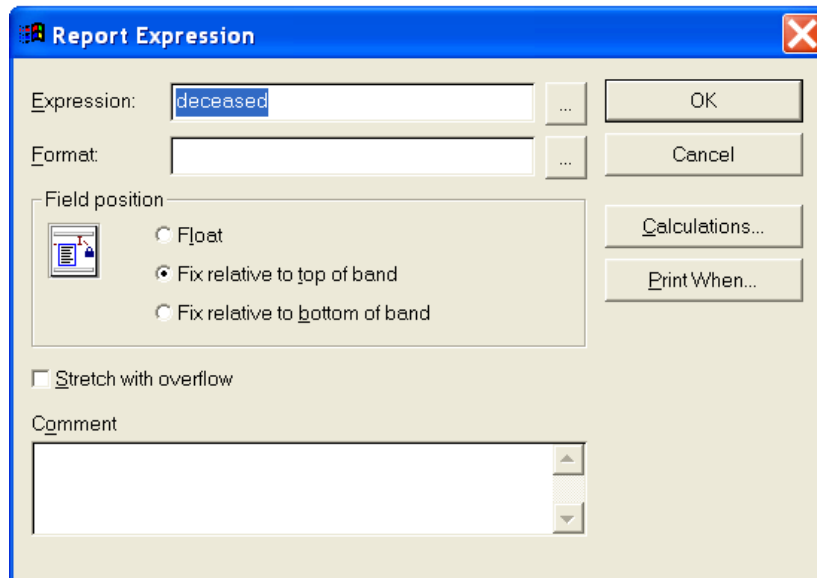


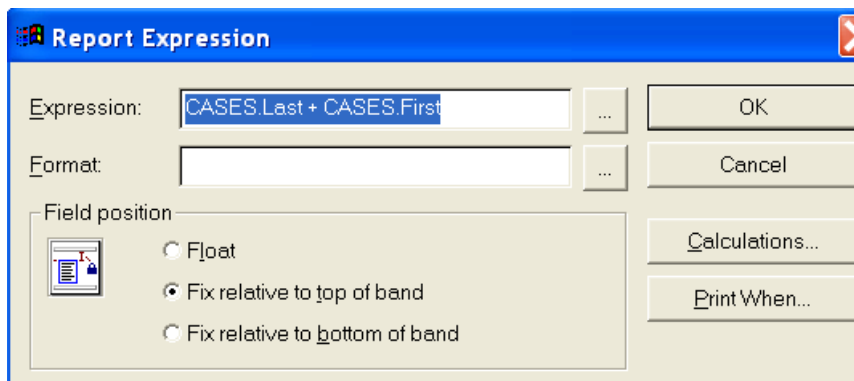
Figure 67 - Report Expression Builder

The Report Expression Builder box allows you to change the data (expression) that will appear on the form. Notice that the word deceased is highlighted. If you start typing from the keyboard, you will replace the word deceased with whatever you type. Type the following: CASES.Last (you can type the capital letters as shown or all lower or upper case, but it makes it easier to understand if you use the convention shown, so please follow it.) Then click on OK and click File, Preview.

Duffus	
<i>Name of Deceased</i>	
OCT 19 1915	OCT 25 2002
Date of Birth	Date of Death
268-28-1937	
Social Security No.	
Mt. Moriah Cemetery 1	
Cemetery	Plot #
Donald O'Connor Funeral Home, Inc.	
Funeral Home	

Now we have just the last name from the CASES file.

Let's add the first name to this. Press Escape to get back to the Report Designer. Double-click the box that now says CASES.Last, and change it to read as below:



Click OK and Preview:

Duffus	Pamelee
<i>Name of Deceased</i>	
OCT 19 1915	OCT 25 2002
Date of Birth	Date of Death
268-28-1937	
Social Security No.	
Mt. Moriah Cemetery 1	
Cemetery	Plot #
Donald O'Connor Funeral Home, Inc.	
Funeral Home	

Not quite what we are after, is it? The problem lies in the way FoxPro Data Tables are set up. When we make a column for Last name or First name, we have to tell FoxPro in advance how many characters we expect the Last name to take up. Obviously, *Bach* is shorter than *Tchaikovsky*, but we have to allow for the longest name we expect to encounter. So we have allowed 15 characters for the last name. Since Duffus is only 6 characters, we have 9 spaces after the last name, then the first name. To show only the name and not all the empty spaces, we TRIM the trailing and leading spaces using a function called ALLTRIM. Functions are little computer programs already in FoxPro or TerraPro that you can use to alter the way data looks. To use a function, state the function name, then surround the data to be altered with parentheses: ALLTRIM(CASES.Last). Edit the box again, changing the data expression as shown in Figure 79:

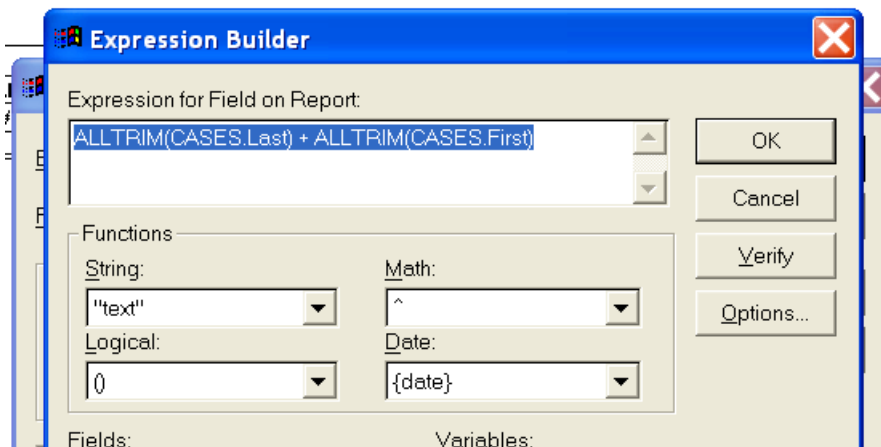


Figure 68 - Expression Builder Detail

Because this expression is too long to see in the box, you can click on the ellipse (...) at the end of the box to open the Expression Builder and see more of what you are typing. Notice we have now told the computer to print the last name (trimmed) plus the first name (trimmed). Click OK and then OK again and then File, Print Preview and let's take a look at what we have done:

DuffusPamelee	
<i>Name of Deceased</i>	
OCT 19 1915	OCT 25 2002
Date of Birth	Date of Death

Whoops! Now we don't even have a space between the last and first names! We can fix that by editing once again. Press ESCape and double-click again on the box we have been editing.

This time we'll do it right. Type the expression as shown below:

```
ALLTRIM(CASES.Last)+" , "+ALLTRIM(CASES.First)+" "+ALLTRIM(CASES.Middle)
```

Note the quotation marks – use either single or double quotes, but always use the same for opening and closing. Also note that there is a space after the comma within the quotes because we want a space after the comma when we print Doe, John Allen. All we are doing is adding words and punctuation together, sort of like vocabulary math.

Now this will give you what you want, except for the upper case last name. Fortunately, FoxPro gives us a function for upper case, called UPPER! Edit your expression builder to read as follows:

```
UPPER(ALLTRIM(CASES.Last))+" , "+ALLTRIM(CASES.First)+" "+ALLTRIM(CASES.Middle)
```

Be sure to get the correct number of parentheses right. Always match beginning and ending parentheses within an expression. Now click File, Print Preview and here are the results:

DUFFUS, Pamelee W.	
<i>Name of Deceased</i>	
OCT 19 1915	OCT 25 2002
Date of Birth	Date of Death
268-28-1937	
Social Security No.	
Mt. Moriah Cemetery 1	
Cemetery	Plot #
Donald O'Connor Funeral Home, Inc.	
Funeral Home	

Whoopee! We got it right. Now if you like what you have done, you can save it with CTRL-W as we discussed above. Otherwise, press ESCape and don't save changes. The form will be as it was when we started this chapter, and someone else can practice the changes.

It is beyond the scope of this manual to teach EVERYTHING about making forms, but with a little curiosity and snooping around the existing forms, you can pick up a lot of the "tricks of the trade".

Let's Do It!

Here's a resource you may not have been aware of:

Go to the Obituary tab of the Case Data screens. You will see a button labeled “Modify Obituary Format”. Don’t be afraid, we’re just looking around. When you open this screen, you see the FoxPro expressions that will automatically write your obituary for you. Click Add, then scroll down to the empty line just added. In the column labeled “Data to Print”, Right-Click and Voila!, you will see a table of expressions for almost every function available in TerraPro.

Copy them down, or better yet, highlight them with the shift and arrow keys and then use CTRL-C to capture the expression, then use CTRL-V to paste it into the expression builder when you are modifying reports. (Of course you could also refer to Appendix C which has them all listed, but then you wouldn't have learned about the obituary format writer!)

Oh yes, as usual, press ESCape to leave the expression list without choosing one.

See Appendix D for more about the Obituary Writer.

NOTES:

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

[illegible]

Chapter 12

Crematory

The Crematory module is available as an add-on to TerraPro. A separate company is setup for the crematory cases. A special screen lets you import cases from your other branches, or you may enter cases for cremation cases from other funeral homes. You can then send statements to those funeral homes for the services rendered.

If the crematory module is installed, you will have a menu choice on the TerraPro Main Menu to open the cremation screens:

The screen looks like this:

CREMATORY

Joseph P. Sample Crematory Oscar The Grouch

Deceased Billing Process Log Emissions

Filenumber: 2009-040

First: Oscar Middle: The Last: Grouch

Race: White Sex: M Social Security #: 123-45-6789 <-- Search by SSN

Birthdate: 01/26/1945 Deathdate: 06/26/2009 Time of Death: 11 AM Age: 64

Weight: 225 ☒ Autopsy? ☐ Embalmed? ☐ Pacemaker?

Artificial Joints or Limbs: Titanium Rod Right Achilles Heel

☒ Family to be Present at Cremation? Cremation Date: 06/30/2009 <-- Search by Cremation Date

Time: 10 AM

Disk #: 1243 District #: County of Death: Hamilton

Cause of Death:

Top Prev Next Bottom Copy Print Label Print Info Print Process Log Print Certificate Add Delete ☐ Modify Report Layout Import Exit

TerraPro 9.09.02 Multi

Case Information
Grouch, Oscar

Add New Case
Edit Survivors
Write Obit
Edit Current Case
Arrangements
Edit Bill
Crematory

Forms, Reports
Forms / Reports
Card Shop
Envelopes-Labels

Office
Doctors/Clergy Lists
Price Lists
Monthly Statements
Cash Receipts
Utilities

Our Website TerraPro Website
Rescue Facebook Twitter
Check for Update
Quit
Marquee
Tribute
Family Advisor™
☐ Show Comments

If you have entered the case into TerraPro screens, you can import that data using the Import button. You will be presented with a composite list of all cases for all branches, and you can search by last name by starting to type the last name.

Alternatively, you could enter the information here. However, that will not allow for billing using your price list for the Cremation Company. We recommend entering the case first into TerraPro and assigning a Person Responsible (PR code) for payment. If it is another funeral home, make PR the MAIN relationship, and you will be able to choose from a list of previously used funeral homes.

When it is time to send statements to the funeral homes you serve, go to the billing tab and choose Print Statements for Range of Dates to print all open invoices for those dates.

CREMATORY

Joseph P. Sample Crematory

Robert David Probos

Deceased

Billing

Process Log

Emissions

Customer Number: HJT001

Sales Order #: 10065

Cremation Permit #: <-- Search by Cremation Permit #

Funeral Home Name: Clepper Funeral Chapel

Print Statements for Range of Dates

<-- For Finding another cremation, Choose Customer or Funeral Home Name

Joseph P. Sample Funeral Home

Joseph

Clepper Funeral Chapel

Clepper

Clepper Funeral Chapel

Clepper

Top

Prev

Next

Bottom

Copy

Print Label

Print Info

Print Process Log

Print Certificate

Add

Delete

☐ Modify Report Layout

Import

Exit

Utilities

There are lots of other things you can do in TerraPro! Here is a detailed explanation of each of the items on the Utility Menu.

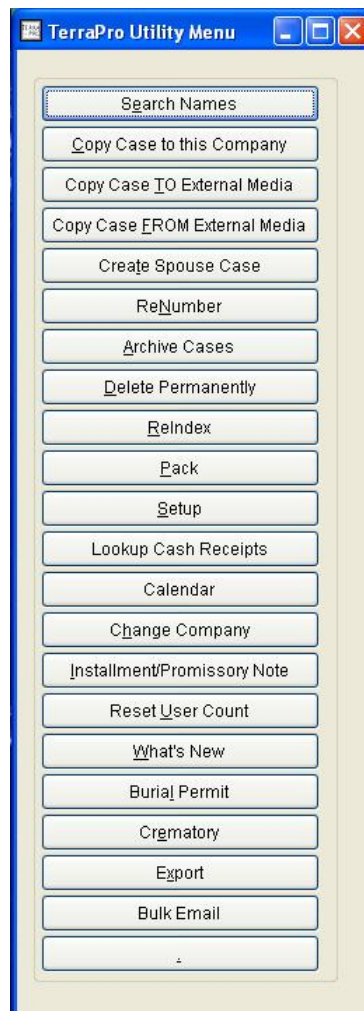


Figure 69 - Utility Menu

Open the Utility Menu by clicking on Utilities on the Main TerraPro Menu bar.

We will explore each item on the next few pages.

SEARCH
NAMES

What's the good in entering all this data over the years if you can't retrieve it quickly? This utility will let you find names of people or text you might have entered in obituaries or other locations.

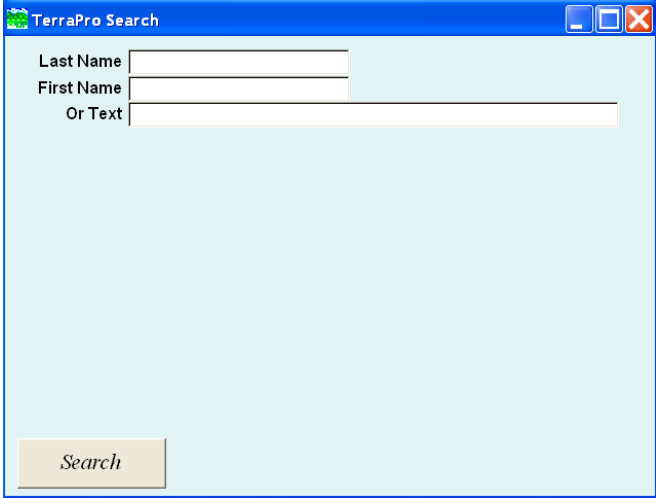


Figure 70 - Search Dialogue Box

If you enter the last or first name of an individual, TerraPro will search for that individual in the survivors file. If you enter Text, you will be asked what text you want to search. Let's try a name. For example, someone may call and say "This is Sarah. You buried my husband a few years ago and I would like to make arrangements for Pre-need." And you can't recall her first name, although you don't want to ask. Just type Sarah into the First Name area, and click *Search*.

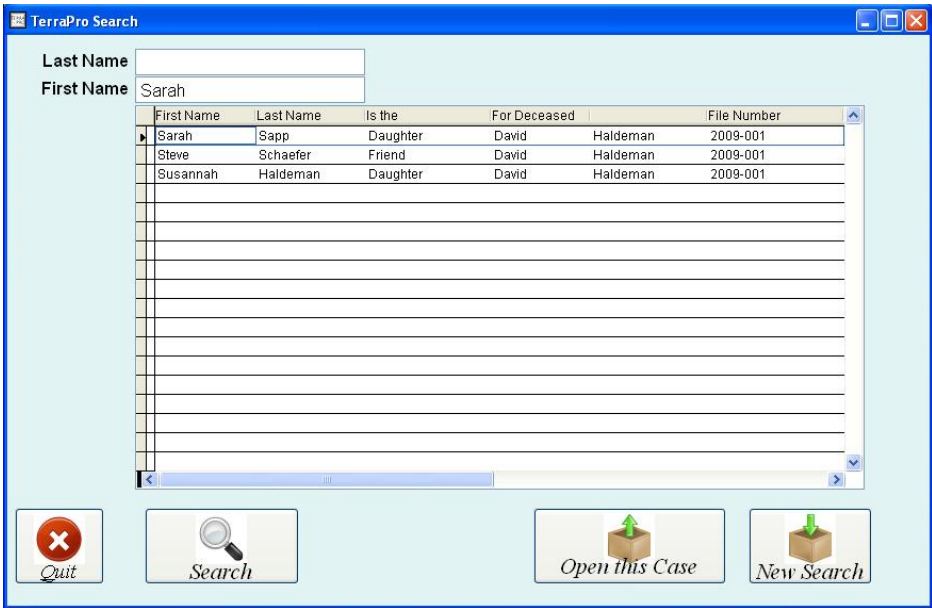


Figure 71 - Name Search Results

Select the correct name by clicking on it and then clicking the *Open this Case* button. Then you can open the case associated with the name you entered, and retrieve data as needed.

SEARCHING
TEXT

Wouldn't it be great to have instant recall of any text you ever entered into comments, obituaries, fraternal or memorials areas? You can! Just type the text into the box on the search screen and TerraPro will recall that item and highlight the text using <<highlighted text>> delimiters.

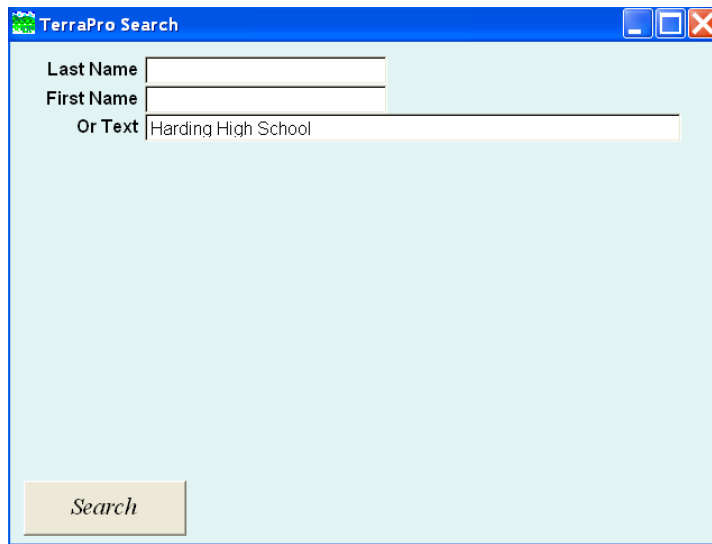


Figure 72 - Searching for Text

Here are the results:

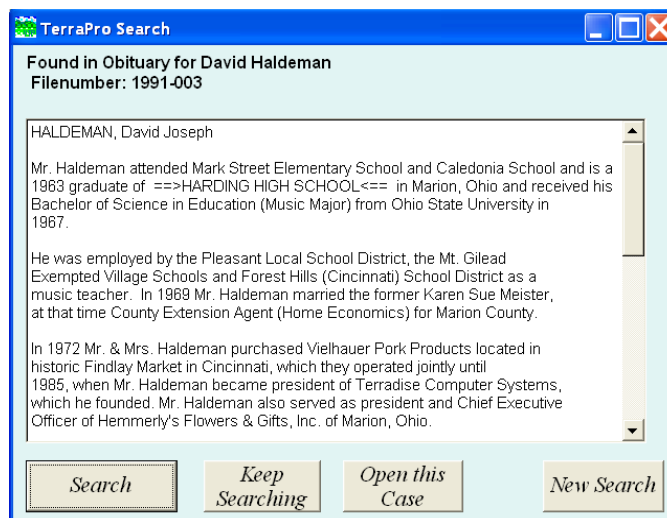


Figure 73 - Search for "Harding High School" Results

If the results shown do not match what you were trying to find, you can click on the Keep Searching Button or start a New Search. Or you can go immediately to this case using the Open this Case Button.

COPY A CASE
TO THIS
COMPANY

This function is used mainly when you want to copy a case from Pre-need to At-Need. Clicking on it will bring up the company selection menu (minus the company you are currently in). Use the mouse to point to the Pre-need company (or other branch if copying between branches)

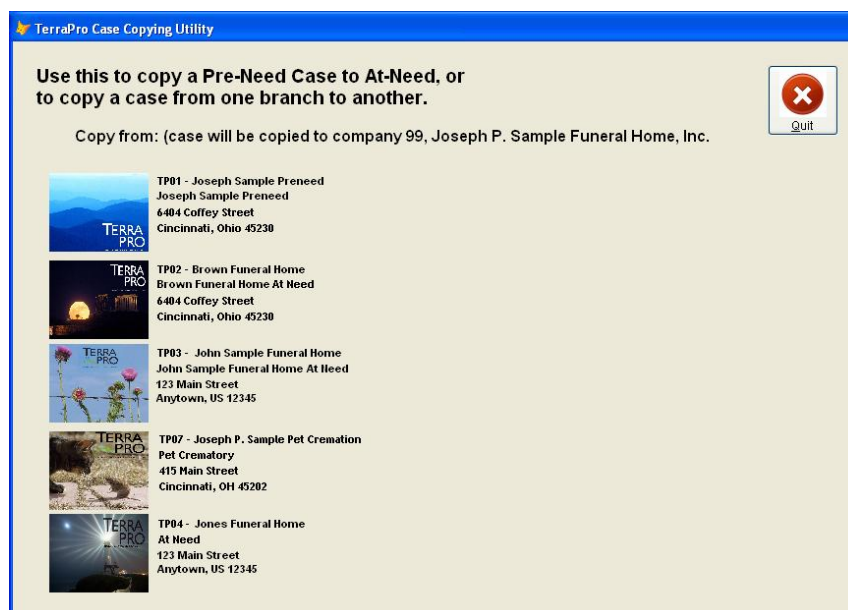


Figure 74 - Branch or Company to Copy FROM

You will be asked to choose a case to copy. Enter a few letters of the last name and TerraPro will find a close match and let you choose:

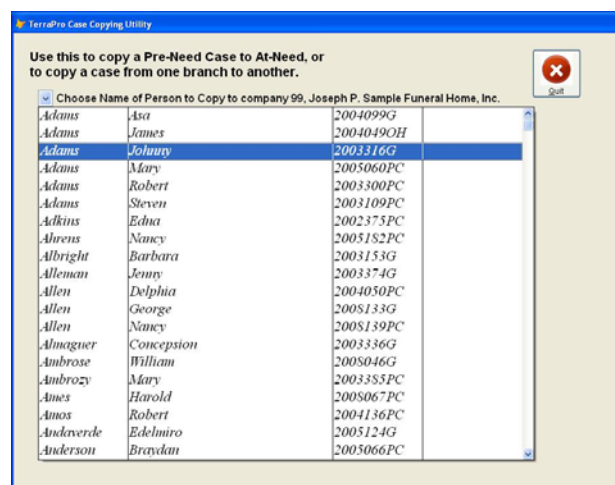


Figure 75 - Choosing a Case to Copy

Or you could right-click to put the list in order by File Number. Choose the right case, then answer the questions presented. TerraPro will automatically assign the next case number, but you can override it if you wish. The case will then be copied into the current company. If you wish for it to remain in the other company as well, answer No when asked if you want it deleted.

COPY CASE TO/FROM EXTERNAL MEDIA

This function is used when you need to move a case from one computer to another. For example, you may be using a laptop computer to make arrangements at a nursing home or residence or other location. Feel free to enter the case, then copy it to RAM Drive or a 3.5" floppy disk and take the disk to the office so that the case may be copied into the TerraPro data files. This requires that TerraPro be setup for use on the laptop or other non-networked computer. TerraPro personnel can do this for you at a nominal cost.

<hr/> CREATE SPOUSE CASE <hr/>	This allows you to add a new case for the spouse of someone you previously buried. Family information common to both spouses is copied to save re-entry. Use this option carefully – remember that family information can change in the time since the original spouse died.
<hr/> RE - NUMBER <hr/>	Occasionally, your file numbers may need adjusting. This utility quickly re-numbers any file number to another, and checks to make sure you are not duplicating a file number already in existence.
<hr/> ARCHIVE CASES <hr/>	Occasionally, your case file may become overly large. After about 6000 to 10,000 cases are entered, the computer may slow to a few seconds refresh time when selecting a case. If you think this may be a problem on your computer, ask TerraPro personnel to create an archive company and move survivors to that company. When needed, the information will be copied from the archive.
<hr/> DELETE PERMANENTLY <hr/>	Usually this is used only when a case was entered twice by mistake or when you entered a practice case that needs deleted. Once you have used this function, you will not be able to retrieve the data, so be sure before proceeding.
<hr/> RE - INDEX <hr/>	TerraPro uses indexes to keep things in order and provide a quick way to retrieve information. It is possible that these indexes can get damaged, and unexpected results will happen. If you see any errors like “Index does not match database” or other index related problems, try the Re-Index before calling us. This may fix the problem.
Since indexing requires exclusive use of TerraPro data files, you must make sure NO ONE ELSE HAS TERRAPRO OPEN ON THEIR COMPUTER before re-indexing.	
<hr/> SETUP <hr/>	Setup is covered in Appendix B
<hr/> MONTHLY STATEMENTS <hr/>	This function allows you to print monthly statements for everyone in the Accounts Receivable List. You are given full control over which bills to print and what billing format to use. You can even print labels or 2 or 3 up statements on special perforated stock.
<hr/> LOAN CALCULATOR <hr/>	This is a quick way to provide for financing for your clients so that they might pay their bill over time. You can enter the financed amount, the percentage rate and the length of the loan, and then print out an amortization schedule.
<hr/> WHAT'S NEW <hr/>	Every version change in TerraPro comes with a listing of the changes made since the last version. It is helpful to read this list to keep up with changes in the program.
<hr/> BURIAL PERMIT <hr/>	TerraPro can handle Burial Permit Tracking for Deputy Registrars. This option is extra cost, and can be added to your system upon request.

CREMATORY	If you have purchased the option crematory package for TerraPro, this will allow you to access it.
. (DOT PROMPT)	This is for TerraPro personnel to use during a <i>Remote Access Rescue Session</i> to fix problems. It is not recommended for use unless told to do so or you feel very confident working with FoxPro data files. Internet Remote Support is available 24-7 from TerraPro Staff by clicking the Rescue button on the Main TerraPro Screen. You will be taken to a website where you can enter a 6 digit PIN to allow knowledgeable helpdesk staff to guide you to an answer, or merely fix a problem or add a new form.

Appendix A - Behind the Scenes

You may be curious about how the data in TerraPro is stored and what happens behind the scenes. If not, skip this section!

FoxPro and TerraPro

TerraPro uses Microsoft FoxPro™ to both store data and as a programming language. In fact the name TerraPro reflects the combination of Terradise Computer Systems and FoxPro. This language is used by most of the funeral home software packages available today. The reason is simple: FoxPro provides the best tools for storing, retrieving and presenting data using a language that has its roots in the dBase, an early database language derived from the Jet Propulsion Laboratory Viking Mission data storage system. (If it's good enough for NASA, it will probably do for us!)

If you haven't read Chapter Ten, *Modifying Reports, Forms and Cards*, please do so before continuing. It will greatly enhance your understanding of what is to follow.

The data used in TerraPro is stored in the following data tables: (nn refers to a two-digit number which corresponds to the company number (01, 02, 03, 99 etc)

TPCASEnn.DBF	Vital Statistics about the deceased
TPSURVnn.DBF	Survivor or People Information
TPVETSnn.DBF	Veterans Information
TPMASTnn.DBF	Billing Master File
TPTRANnn.DBF	Billing Transaction File
ARCUSTnn.DBF	Customer File
ARCASHnn.DBF	Cash Receipts File
ARINVTnn.DBF	Price Lists (General, Casket, Vault, Etc.)
TPCREMnn.DBF	Crematory Information File
TPGOODnn.DBF	Goods & Services Description File (one for each default bill)
SYSDATA.DBF	System Setup File
TPDATA.DBF	Data about Data! (Metadata)
TPSTAF.DBF	Staff Information File
TPLOCA.DBF	Hospital, Cemetery Location File
TPRELA.DBF	Relationship Lookup File
TPFORM.DBF	Forms Description File
TPROMP.DBF	Prompts for Screens, Windows
TPVERSE.DBF	TerraPro Card Shop Verse File
TPLETTER.DBF	Letters Description File
TPSTATES.DBF	State Lookup File

SYSTABL.DBF

List of Forms, Reports, Cards

SYSDATA.DBF

When you start TerraPro, the first file opened is SYSDATA.DBF. This file lists all your branches (“companies”) and allows you to choose which one you want to work with. This file records the company number, name, address, tax rate, and many other data items that are unique to this particular branch.

TPDATA.DBF

The table named TPDATA.DBF is where TerraPro gets information about what files to open when TerraPro starts up. It also knows the structure (what data fields are in the file) so that any changes to data fields are made in this file and this file is updated whenever you run the automatic update.

Because you can have up to 99 branches for which you track data, and the data is stored in separate files for each branch, TerraPro assigns a number from 01 to 99 to each branch, and appends the number to the case files name to keep the data separate. When you select which “company” or branch that you want to work with, you are really saying, “Open the files that end in 01 or 02 or 03, etc.”

Some of the files are used by all branches in common, such as the staff listing, the list of forms used, the locations of various nursing homes, hospitals, cemeteries, etc. and other system-wide data.

TPSTAF.DBF

Next, the staff file is opened, in order to provide lists for choosing Funeral Director, Embalmer, Doctors and Clergy. This is a file common to all branches, so when a doctor is used at one branch, he can be selected from another branch without re-entry.

TPLOCA.DBF

The locations file is opened, providing pull-down lists of Cemeteries, Hospitals, Nursing Homes and other locations you have used in the past.

TPRELA.DBF

Knowing the relationships between people are critical in the funeral business. In order to standardize these relationships, a series of two character codes is used. Here is where they are stored.

TPFORM.DBF

The names of the forms you use are stored in this file, along with any commands which tell TerraPro what data is needed to be gathered before the form is printed.

TPROMP.DBF

Because some versions of TerraPro support foreign languages, a method of storing certain prompts and data headings was devised so that the text could be derived for other languages. This file may or may not be used by your version of TerraPro.

ARINVTNN.DBF

Price lists are stored in this file. Each branch can have its own price list.

<hr/> TPGOOD.DBF <hr/>	The default bill is stored in this file, and it acts as a template for the other default bills, such as direct cremation or immediate burial, or other package plans.
<hr/> TPCREM.DBF <hr/>	If you have the optional crematory program, this file is used for information about the cremains
<hr/> TPVERSE.DBF <hr/>	This file contains the list of verses or prayers which are printed on memorial folders, prayer cards or other memorial merchandise.
<hr/> TPLETTER.DBF <hr/>	The letters you can send to families, contacts or businesses are stored here. Remember that FoxPro can store long text in Memo fields and using special commands, that text can be merged with data.
<hr/> TPSTATES.DBF <hr/>	This is a lookup table to assure that you are using the correct abbreviations for the 50 states.
<hr/> SYSTABL.DBF <hr/>	Lastly, this file is used to list all the forms and cards in your system. This file is redundant, in that it contains the same data as TPFORM.DBF, so it may go away in future versions of TerraPro.

Each of the above tables has many fields of data within the file. To see a complete description of the data stored in it, run the Data Dictionary Report on the Reports List. (If you do not have this report, please contact us at 513-484-9729)

Modify (Browse) Billing Format

Back in Chapter Eight, Price Lists, you were told you could setup a wide variety of billing formats for Direct Cremation, Immediate Burial etc. There is a button on that setup screen (Choose Price Lists from the Main TerraPro Menu, then Edit Default Bill) as shown below:

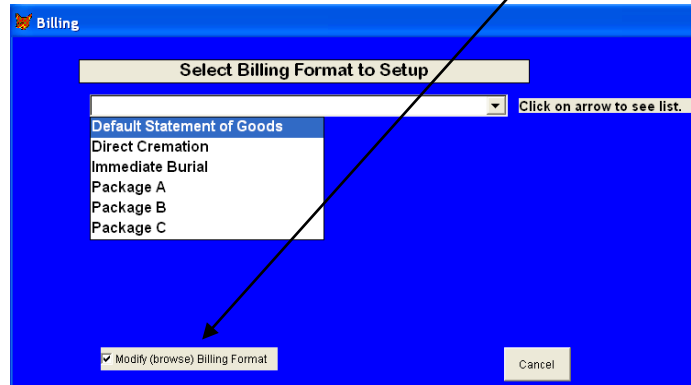


Figure 76 - How to modify bill to allow description edit

When you have the checkbox checked, and then select a billing format to modify, you will be presented with the following browse of data: (it has been scrolled down to show the pertinent items)

Billing	
Group	Descrip
1T	TOTAL SERVICES SELECTED
2H	2. ALTERNATIVE SERVICE SELECTION
2H	(As per General Price List)
2G	Immediate Burial
3H	3. MERCHANDISE SELECTED
3H	Casket
3C	
3H	Vault
3V	
3	Acknowledgment Cards
3	Visitors Register
3	Memorial Cards (per 50)
3	Crucifix or Cross
3	Prayer Cards (per 100)
3	
3G	
3G	
3G	
3Z	Total Merchandise Selected
3T	Sales Tax
4H	4. CASH ACCOMMODATION ITEMS
4	Certified Copies of Death Certificate
4	Clergy
4	Cemetery/Crematory Charges
4	Newspaper Notices
4G	Flowers
4G	Music
4G	
4G	

Figure 77 - Browsing the Default Bill File

Pay close attention to the left hand column labeled Group. This is the key to how items are grouped on your bills. Notice that some of the items have a C, V, G, H, T or Z after the group number. This is a code to allow TerraPro to decide how to format the items when they appear on the editing screen. C is reserved for the casket line, V for the vault. Headers are identified with an H. Lines that total the lines in the group have a Z, and sales tax is reserved with T. That leaves G, which stands for Get description. If you put an Upper Case G (not g) after the number, you will be able to edit the description. You may wish to explore other parts of this browse, and if you have further questions, TerraPro personnel will be happy to answer them.

IT IS NOT RECOMMENDED THAT ANY NEW ROWS BE ADDED TO THIS TABLE,
OR THAT THE ORDER BE CHANGED. THIS INFORMATION IS PRESENTED AS
INFORMATIONAL ONLY

NOTES :

Appendix B - Setting up Companies

TerraPro personnel will setup your companies. For further information, call us and make notes on this page.

Occasionally, you may need to change some aspect of your setup, such as Sales Tax Rate, or company address or finance charge rate.

To reach the setup screen, use the Utility Menu on the Main TerraPro Screen and choose Setup. You will be setting up information for the currently opened company only, so if changes need to be made to all branches, you will have to repeat these steps.

TerraPro Setup

Name of Company: Joseph P. Sample Funeral Home, Inc.

Address: 6404 Coffey St
Cincinnati, Ohio 45230

Phone: 513/484-9729 **FAX:**

Branch Name(s): Sample Data

Company email: dhaldeman@terradise.net

Company website: http://boyd-bornfuneralhome.com

Language: ENGLISH

Default City, State & ZIP: Cincinnati OH 45230

Default County: Hamilton **Set Bill Date to Deathdate or Service Date?** ☒ S

Registrar #: **Sales Tax District:** Hamilton C **Fiscal Year Ends:** 12 **Use Passwords?** ☒ N

Sales Tax Rate: 6.50 **Group Tax or Per Line?** ☒ G

Finance Charge: 1.50 ☒ Link to Accounting Program?

Name of Accounting Software: Quickbook ☒ Use Deceased Name as Customer Name

Accounting Software Data File: D:\PROGRAM FILES\INTUIT\QUICKBOOKS\PRO\JOSEPH P

Default AR Account: Accounts Receivable:Accounts Receivable - Branch 1

List Cases by Filenumber or Deathdate? (F/D) ☐ F **Pricelist Effective Date:** 06/09/2008

File Number Format: YYYY-**nnn** **Last File Number Used:** 2009-027G **Default Payment Terms (days)** 30

Next Bill Number: 10059 **Alternate Card Shop Data Folder:** **Backup Interval (Days):** 4

TerraPro Help Phone/email: 513-484-9729 or dhaldeman@terradise.net **Timeout Interval (Minutes):** 0

Data File Drive:\Folder: **System File(s) Drive:\Folder:** **Billing Timeout (Minutes):** 0

Laptop Installation: ☐ **Update Website Obits from TerraPro?** ☐

Send e-Mails from TerraPro? ☒

Email Server (Example: smtp.yourIP.net) smtp.youremailprovider.net

SMTP User Name: youremailaddress **Password:** yourpassword

Buttons: Quit, Add Company, Choose Price List, Choose Memorial Merchandise, Delete Company

Figure 78 - Setup Editing Screen

Most of these items are critical to the way TerraPro behaves, so use care in editing this screen. Your funeral home name cannot be changed except by TerraPro personnel. The address and phone, company email and website may be changed at will. Branch name lets you call different branches by the familiar names by which you refer to them. The default City/State/County and ZIP are what will appear by default as you enter survivors or other data. The registrar # can be filled in if you are a deputy registrar for purposes of filing death certificates or other papers.

The Default Tax Rate is your local sales tax rate. If funerals are not taxed in your state, this must be set to 0.00

The Finance Charge rate per month is entered here. If you never charge finance charges, enter 0.00. (18% per annum would be entered as 1.50 (1.5 times 12 = 18%)).

Calculate Tax Per Line should be set to L. It is possible in some circumstances to change this to G, which means to calculate tax on the Total of all taxable items, but most funeral homes now use itemized bills, showing the tax charged on each item.

Link to Accounting Program allows you to export customer and invoice detail to your accounting program. You must first setup your accounting program with the items you are selling and transfer their descriptions to TerraPro, using the Pricelist Editing Screens.

Choose which accounting program you are using by pulling down the list and selecting with the mouse. TerraPro currently supports linking to QuickBooks only. See Page 68 for setup instructions

Default Link Code is only used if linked to the SBT Accounting System (Obsolete). Leave blank otherwise.

Data File Drive / Directory should NEVER be changed – you will lose contact with your data! It should read C:\VTP or C:\TERRAPRO on single user systems, or indicate the drive letter of a shared drive on a network system (usually T:) Optionally, it can be left blank as it will use the data files in the same folder where TerraPro is installed.

Email Server is for using TerraPro's Obituary Email Utility. You will also need to know your user account and password. This can be obtained from your Internet Provider or by inspecting the settings in Microsoft Outlook.

Use Passwords allows you to lock out certain sensitive portions of the program using a two level password system. This may not be fully implemented in your version of TerraPro.

Fiscal Year Ends allows reports that are fiscal year based to determine the end of the fiscal year.

Laptop Installation allows setup for using a stand alone laptop for making arrangements, then connecting to a network at the office to transfer files. Fill in the blanks regarding the server drive name and directory.

Send e-Mails from TerraPro? If you have purchased the optional email add-on for sending

User Name and Password are for remote access over the internet only, when automatically logging onto the server.

File Number Format allows you to setup your file numbering scheme. The suggested format is something like 2003-040 for the 40th case in the year 2003. But other schemes are possible. Here are the rules for the File Number Format template:

YYYY – year – this will remain constant until changed each new fiscal year.

nnn – consecutive number. TerraPro will automatically increment this part of the file number as each new case is added. (This can be as many digits as required to handle your funeral home’s annual funeral count.)

CC – any character

Last File Number Used lets you reset the file number in case the automatic file numbering becomes misaligned.

Next Bill Number is the internal billing number to be assigned next. Do not change unless instructed by TerraPro personnel.

CardShop Data Folder is used for determining where the CardShop will store it’s copies of the cards you print. This can be useful for later archiving or deleting of these files, which store information about each card you print.

Backup Interval in days. TerraPro automatically creates a ZIP™ file of your data when you exit. How often this occurs is controlled by this setting. You can also force a backup on the Utility Menu. You should then backup the file C:\TERRAPRO\VTP.ZIP to a ZIP drive, RAM Disk, CDR or other removable storage media. (On older installations, the TerraPro folder is C:\VTP)

Pricelist Effective Date may or may not be referenced on your forms. See TerraPro personnel to determine whether this is used. Usually it is part of the Topline Memo asked for when you print the price lists.

When you finish making changes or reviewing this screen, you will be asked if you want to Update System File. If you have made changes, say Y for Yes, or N for No if just looking.

Adding a Company or Branch

You can add another branch with the same funeral home name by using the Add Company button.

Unless previously licensed for other company names, you will not be able to add other branches until you contact TerraPro personnel. At that time, a determination will be made whether you must pay for additional branches or not.

NOTES :

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Appendix C - Expression Listing

This list is only a sample of the many expressions available in TerraPro. Some are FxoPro expressions and others are exclusive to TerraPro. Use 'em!

(This list is for reference only – use right-click when editing letters or Modifying Obituary Format to see the list and automatically type the expression for you)

```

Age in Days (if under 1 year)..... IIF(CASES.AGE < 1,Daysold,'')
Age in Months (if under 1 year)..... IIF(CASES.AGE < 1,Monthsold,'')
Age in Years..... CASES.AGE
Armed Services - puts XX if NOT member..... IIF(CASES.Armedserv='N','XX',' ')
Armed Services - puts XX if member..... IIF(CASES.Armedserv='Y','XX',' ')
Attorney - Address + Street..... f0address(SURVIVORS,AT)
Attorney - City, State ZIP..... f0csz(SURVIVORS,AT)
Attorney - Name..... f0name(SURVIVORS,AT)
Attorney - Phone Number(s)..... f0phone(SURVIVORS,AT)
Branch of Service = XX if Air Force..... IIF(UPPER(VETERANS.Branch)='AIR FORCE','XX','')
Branch of Service = XX if Army..... IIF(UPPER(VETERANS.Branch)='ARMY','XX','')
Branch of Service = XX if Coast Guard..... IIF(UPPER(VETERANS.Branch)='COAST
GUARD','XX','')
Branch of Service = XX if Marines..... IIF(UPPER(VETERANS.Branch)='MARINES','XX','')
Branch of Service = XX if Navy..... IIF(UPPER(VETERANS.Branch)='NAVY','XX','')
Branch of Service = XX if Other..... IIF(UPPER(VETERANS.Branch)='O','XX','')
Business of Deceased..... ALLTRIM(CASES.BUSINESS)
Casket Price (number may vary with price list..... getbillitem(35,'price')
Cemetery - Grave Number..... ALLTRIM(CASES.Grave)
Cemetery - Lot Number..... ALLTRIM(CASES.Lot)
Cemetery - Lot Owner..... ALLTRIM(CASES.Lotowner)
Cemetery - Section..... ALLTRIM(CASES.Section)
Cemetery Location (City, State)..... ALLTRIM(CASES.LOCATION)
Cemetery Name..... ALLTRIM(CASES.CEMETERY)
Cemetery Name, City, State..... TRIM(CASES.Cemetery)+' '+TRIM(CASES.Location)
Certified Copies - Qty Ordered..... ALLTRIM(STR(INT(getbillitem(50,'qtyord'))))
Certifier - Doctor's Name and Address..... f0name(SURVIVORS,CE)+ '
'+f0address(SURVIVORS,CE)+'
'+f0csz(SURVIVORS,CE)
Citizenship..... ALLTRIM(CASES.Citizenshp)
City of Death..... ALLTRIM(CASES.Citydeath)
City of Residence - Deceased..... f0city(SURVIVORS,SE)
City, Locale or Twp for Death Certificate..... f0twp(SURVIVORS,SE)
Clergy Name - 1st Clergy..... f0name(SURVIVORS,C1)
Clergy Name - 2nd Clergy..... f0name(SURVIVORS,C2)
Comments - Line 1..... MLINE(CASES.Comments,1)
Comments - Line 2..... MLINE(CASES.Comments,2)
Comments - Line 3..... MLINE(CASES.Comments,3)
County of Death..... ALLTRIM(CASES.Cntydeath)
County of Residence - Deceased..... f0county(SURVIVORS,SE)
Date of Birth - long form (January 26 1945)..... f0longdate(CASES.Birthdate)
Date of Birth - short form (JAN 26 1945)..... f0shortdate(CASES.Birthdate)
Date of Burial - Long Form (January 29 1994)..... f0longdate(CASES.Burialdate)
Date of Burial - Short Form (JAN 29 1994)..... f0shortdate(CASES.Burialdate)

```

```

Date of Death - long form (January 26 1994)..... f0longdate(CASES.Deathdate)
Date of Death - short form (JAN 26 1994)..... f0shortdate(CASES.Deathdate)
Date of Funeral Service (as entered)..... ALLTRIM(CASES.Service)
Date-Today - long form like January 10, 1994..... f0longdate(DATE())
Date-Today - short form (JAN 10, 1994..... f0shortdate(DATE())
Deceased's Birthplace (City, State)..... TRIM(CASES->Cityborn)+IIF(.NOT.
                                         EMPTY(CASES.Statborn),'', '+TRIM(CASES-
                                         >Statborn),'')
Deceased's Date of Birth (Numbers)..... CASES.Birthdate
Deceased's Date of Burial (Numbers)..... CASES.Burialdate
Deceased's Date of Death (Numbers)..... CASES.Deathdate
Deceased's Name / First Middle Last..... deceased
Deceased's Name / First, Middle, LAST Upper..... ALLTRIM(CASES.First)+
IIF(EMPTY(CASES.Middle),'', +
ALLTRIM(CASES.Middle))+ ' ' +ALLTRIM(UPPER(CASES.Last))
Deceased's Name / Last, First Middle ALLTRIM(CASES.Last)+, +ALLTRIM(CASES.First)+
                                         +ALLTRIM(CASES.Middle)
Deceased's Residence (Address)..... f0address(SURVIVORS,SE)
Deceased's Residence (City, State ZIP)..... f0csz(SURVIVORS,SE)
Deceased's Residence (Street)..... f0street(SURVIVORS,SE)
Deceased's Residence - State Only..... f0state(SURVIVORS,SE)
Deceased's Residence - ZIP Code Only..... f0zip(SURVIVORS,SE)
Deceased's State of Death..... ALLTRIM(CASES.Statdeath)
Disposition..... ALLTRIM(CASES.Disposal)
Education Level of Deceased - Primary..... ALLTRIM(CASES.PRIMARY)
Education Level of Deceased - Secondary..... ALLTRIM(CASES.SECONDARY)
Embalmer's FAX (function can call any field)..... f0field(STAFF,CASES.Embalmer,FAXPHONE)
Embalmer's License Number..... f0license(STAFF,CASES.EMBALMER)
Embalmer's Name..... f0name(STAFF,CASES.EMBALMER)
Father of Deceased..... f0name(SURVIVORS,FA)
Filenumbr..... ALLTRIM(CASES.Filenumbr)
Flag Form Remarks - Line 2..... f0memo(VETERANS.Flagremark,5,85,2)
Flag Recipient - Address, Street..... f0address(SURVIVORS,VETERANS.Flagrecip)
Flag Recipient - City, State ZIP..... f0csz(SURVIVORS,VETERANS.Flagrecip)
Flag Recipient - Name..... f0name(SURVIVORS,VETERANS.Flagrecip)
Flag Recipient - Relationship to Deceased..... f0relation(VETERANS.Flagrecip)
Funeral Director's Name..... f0license(STAFF,CASES.DIRECTOR)
Funeral Home Address (Line 1)..... ALLTRIM(SUBSTR(SYSDATA.ADDRESS,1,35))
Funeral Home City, State ZIP..... ALLTRIM(SUBSTR(SYSDATA.ADDRESS,36,35))
Funeral Home Name..... m0cname
Informant FAX (function can call any field)..... f0field(SURVIVORS,IN,FAXPHONE)
Informant's Address and City, State ZIP..... f0address(SURVIVORS,IN)+
+f0csz(SURVIVORS,IN)
Informant's Name..... f0name(SURVIVORS,IN)
Informant's ZIP Code..... f0zip(SURVIVORS,IN)
Inside City Limits? Prints Yes, No or Unknown
..... IIF(UPPER(CASES.Inside)=Y,Yes,IIF(UPPER(CAS
ES.INSIDE)=N,No,Unknown))
Marital Status..... ALLTRIM(CASES.Marital)
Memorials..... ALLTRIM(CASES.Memorials)
Mother of Deceased..... f0name(SURVIVORS,MO)
Obituary..... f0memo(CASES.Obituary)
Occupation of Deceased..... TRIM(CASES.OCCUPATION)
Origin - Puts X if Hispanic..... IIF(.NOT. EMPTY(CASES.ORIGIN),'XX',' ')
Origin - Puts X if NOT Hispanic..... IIF(EMPTY(CASES.ORIGIN),'X',' ')
Origin of Deceased (Hispanic Origin)..... ALLTRIM(CASES.ORIGIN)
Person Responsible - Address + Street..... f0address(SURVIVORS,PR)
Person Responsible - City, State ZIP..... f0csz(SURVIVORS,PR)
Person Responsible - Name..... f0name(SURVIVORS,PR)
Person Responsible - Phone Number(s)..... f0phone(SURVIVORS,PR)
Phone Number - Home Only - Informant..... f0phone(SURVIVORS,IN,.t.)
Phone Number - Work Only - Informant..... f0workphone(SURVIVORS,IN)
Phone Number(s) - Attorney..... f0phone(SURVIVORS,AT)
Phone Number(s) - Certifier (Doctor)..... f0phone(SURVIVORS,CE)
Phone Number(s) - Clergy/Church..... f0phone(SURVIVORS,C1)
Phone Number(s) - Clergy/Church (2nd)..... f0phone(SURVIVORS,C2)
Phone Number(s) - Informant..... f0phone(SURVIVORS,IN)
Phone Number(s) - Person Responsible..... f0phone(SURVIVORS,PR)
Phone Number(s) - Person Responsible..... f0phone(SURVIVORS,PR)
Phone Number(s) - Spouse..... f0phone(SURVIVORS,SP)
Place of Death - Name of Facility..... ALLTRIM(CASES.Institute)
Place of Death - Puts X if Dead on Arrival..... IIF(UPPER(CASES.Placdeath)='DOA','X',' ')
Place of Funeral Service..... ALLTRIM(CASES.Place)
Race of Deceased..... ALLTRIM(CASES.RACE)
Relationship of Deceased to Niece..... f0relation(NC,.t.)
Relationship of Informant to Deceased..... f0mainrelation(IN)
Sex - Print Male or Female..... IIF(UPPER(CASES.Sex)='M',Male,Female)
Social Security Number..... ALLTRIM(CASES.SSN)

```

Spouse's Name (maiden name if male deceased)..... IIF(SUBSTR(CASES.Marital,1,1)='M',IIF(CASES
.Sex='M',f0name(SURVIVORS,WM),f0name(SURVIVORS,SP)),None)
Spouse's Social Security Number..... ALLTRIM(CASES.SpouseSSN)
State - First Funeral Director..... f0state(STAFF,F1)
State of Residence - Deceased..... f0state(SURVIVORS,SE)
Time of Death..... ALLTRIM(CASES.timedeath)
Time of Funeral Service..... ALLTRIM(CASES.Timeservic)
Title for Clergy 1 (Rev., Father, etc)..... f0title(SURVIVORS,C1)
Vault - Container - Outer Burial Container..... ALLTRIM(CASES.Vault)
Veteran's Branch of Service..... ALLTRIM(VETERANS.Branch)
Veteran's Date of Entry into Service (numbers)..... VETERANS.Entrydate
Veteran's Date of Exit from Service (numbers)..... VETERANS.Exitdate
Veteran's Discharge Status (Honorable or Dis-..... ALLTRIM(VETERANS.Discharge)
Veteran's Flag Recipient..... f0name(SURVIVORS,FL)
Veteran's Organization..... ALLTRIM(VETERANS.Organizati)
Veteran's Place of Entry into Service..... ALLTRIM(VETERANS.Entryplace)
Veteran's Place of Exit from Service..... ALLTRIM(VETERANS.Exitplace)
Veteran's Rank..... ALLTRIM(VETERANS.Rank)
Veteran's Service = XX if Armed Services..... IIF(UPPER(VETERANS.Vetservice)='A','XX','')
Veteran's Service = XX if Korea..... IIF(UPPER(VETERANS.Vetservice)='K','XX','')
Veteran's Service = XX if Spanish American..... IIF(UPPER(VETERANS.Vetservice)='S','XX','')
Veteran's Service = XX if Vietnam..... IIF(UPPER(VETERANS.Vetservice)='V','XX','')
Veteran's Service = XX if WW I..... IIF(UPPER(VETERANS.Vetservice)='1','XX','')
Veteran's Service = XX if WW II..... IIF(UPPER(VETERANS.Vetservice)='2','XX','')
Veteran's Service Serial Number..... ALLTRIM(VETERANS.Servicesn)
Veteran's VA File Number..... ALLTRIM(VETERANS.Vafilenum)
Veteran's War or Period of Service..... f0vetservice(VETERANS.Vetservice)
Visitation Days and Times..... ALLTRIM(CASES.Visitation)
Words - Funeral Director..... Funeral Director
ZIP - First Funeral Director..... f0zip(STAFF,F1)
ZIP - Informant..... f0zip(SURVIVORS,IN)

Appendix D - Supplemental Screens

FLIGHT INFORMATION

You can enter information about flight schedules complete with notes for the attendant accompanying the body to the airport. Having this information handy with the case information can avoid confusion about schedules.

The screenshot shows a software window titled "Flight" with a sub-header "Flight Information". The form contains the following fields and values:

- Leg:** 1
- Flight #:** 1564
- Airline:** Delta
- Depart Day & Time:** 09/30/2006 12:00:00 AM
- Depart Airport:** DAY (dropdown) James M. Cox Dayton Int'l Airport, Dayton OH
- Arrival Day & Time:** 09/30/2006 12:00:00 AM
- Arrive air:** ATL (dropdown) Atlanta-Hartsfield-Jackson International Airport, Atlanta GA
- Prepaid:** ☒
- Notes:** Have casket at airport by 11 PM Saturday September 29.

At the bottom of the window is a row of buttons: Top, Prev, Next, Bottom, Find, Print, Add, Edit, Delete, and Exit.

A complete database of all airports in the world is included with this feature. The schedule can be printed:

Joseph P. Sample Funeral Home, Inc.

6404 Coffey St
Cincinnati, Ohio 45230

Flight Schedule

Name of Deceased: David Joseph Haldeman

First Leg

Have casket at airport by 11 PM Saturday September 29.

Airline: Delta Flight # 1564 Prep aid
Depart: DAY - James M. Cox Dayton Int'l Airport, Dayton OH
Saturday 09/30/2006 12:00:00 AM
Arrive: ATL - Atlanta-Hartsfield-Jackson International Airport, Atlanta GA
Saturday 09/30/2006 12:00:00 AM

Second Leg

Airline: Delta Flight # 1062 Collect
Depart: ATL - Atlanta-Hartsfield-Jackson International Airport, Atlanta GA
Saturday 09/30/2006 12:00:00 AM
Arrive: SRQ - Sarasota-Bradenton International Airport, Sarasota/Bradenton FL
Saturday 09/30/2006 12:00:00 AM

Third Leg

Please make sure they get the casket off the plane in Botosani

Airline: Botswana Flight # 2289 Prep aid
Depart: SRQ - Sarasota-Bradenton International Airport, Sarasota/Bradenton FL
Monday 10/01/2007 12:00:00 AM
Arrive: QDD - , Botosani
Tuesday 10/02/2007 12:00:00 AM



As an added service for your families, digital photos of the flowers can be taken and recorded within TerraPro. A list of the tributes, complete with photos can then be given the family for acknowledging the expressions of sympathy.

TerraPro Floral Tribute Screen

Floral Tributes for David Joseph Haldeman File Number: 2007-850

Description: Fresh Flowers in Basket

Sender(s): George, Randy, Kim, Harry and Marty Smith

Florist: Jack Herb Florist

Photo: C:\TERRAPRO\IMAGES\FLOWERS\FTD LOVING REMEMBRANCE.JPG

Top Prev Next Bottom Find Print Add Edit Delete Exit

04/23/2008 11:27:53 AM Page 1 2007-850

Floral Tributes for David Joseph Haldeman

From: Joyce Van Wye

Fresh Flowers in Vase
Hemmerly's Flowers and Gifts

From: Hodapp Funeral Home

Divinity Basket
Jack Herb

From: The staff at Hemmerly's Flowers
Red Roses and Camations

From: George, Randy, Kim, Harry and Marty Smith

Fresh Flowers in Basket
Jack Herb Florist

Print Preview

C H E C K L I S T

A checklist of to-dos and tasks can be printed for staff to use. This checklist can be modified by right-clicking items to change their descriptions.

The screenshot shows the 'Funeral Checklist' application window. It features a blue title bar with the text 'Funeral Checklist'. The main area is divided into several sections:

- Item/Completed by:** A table with three columns. The first column lists items with checkboxes. The second column is for the name of the person who completed the item. Items include: Post (checked), Photo Scanned, Cemetery, Vault Ordered (checked), Clergy Notified, Organist (checked), Vocalist, Florist, Hairdresser, Fraternal, Flag Box, Obits Mailed, Service Questionnaire, Portrait Requested, Portrait Ordered, Tribute Made, Tribute Delivered, Final Date Ordered, Presidential Cert, Rose Bush Planted, Creative Concept, Social Security, DC to Doctor, DC to Health Dept, DC to Family, Insurance Claim, Insurance Ordered, VA County, VA Headstone, VA Flag Form, and Interment Ordered.
- Special Items/Completed by:** A table with two columns. The first column lists special items, and the second column is for the name of the person who completed them. The first row shows 'Special one' completed by 'David'.
- Personnel:** A table with two columns. The first column lists personnel roles, and the second column is for the name of the person. Roles include: Hearse Driver, Limo Driver, Limo Pickup Time, Limo Pickup Place, Funeral Attendant, Funeral Attendant, Funeral Attendant, and Funeral Attendant.
- Prep Room:** A section with dropdown menus for 'Shaving' (Moustache), 'Hair' (Per Photo), and 'Cosmetics' (Natural). There is also a 'Notes' text area.
- Buttons:** 'Print Checklist', 'Print Funeral Schedule', 'Include All Checklists', and 'Quit' (with a red X icon).

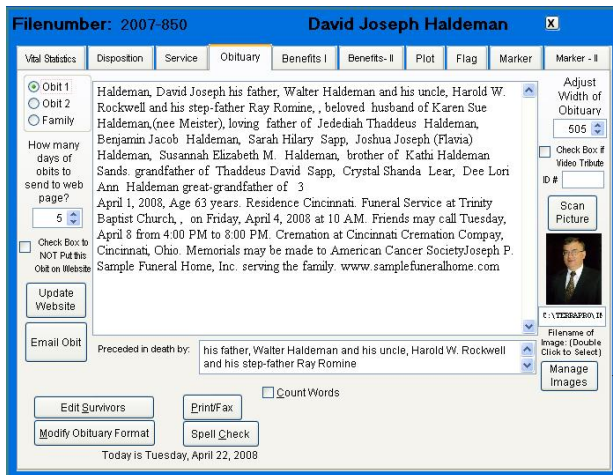
Below the 'Item/Completed by' table, there is a text box that says: 'You can change the item descriptions by right-clicking on them. Then you can save these descriptions for future cases by checking the check box to the right.' To the right of this text is a checkbox labeled 'Save these Items as Default'.

You can change the descriptions at the top of the form by right clicking on them. For example right-clicking the “Creative Concept” description allows you to enter a different item:

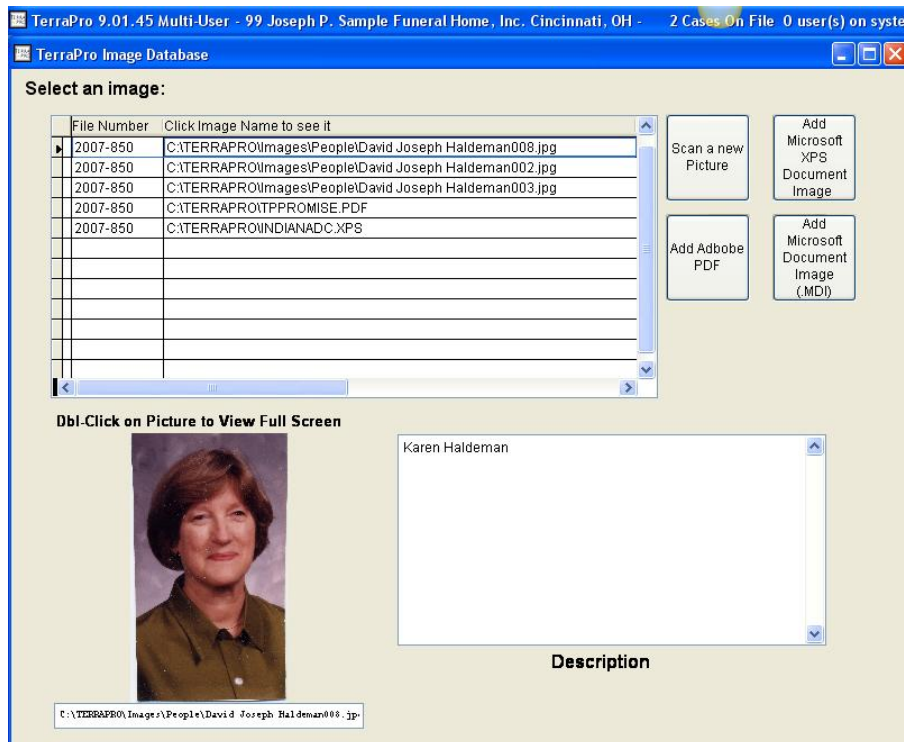
This close-up view shows the 'Creative Concept' item in the 'Item/Completed by' table. The item is highlighted with a yellow background. To the right of the item is a checkbox labeled 'Save these Items as Default'. Below the item is a text box that says: 'You can change the item descriptions by right-clicking on them. Then you can save these descriptions for future cases by checking the check box to the right.' To the right of this text is a checkbox labeled 'Save these Items as Default'. Below the 'Creative Concept' item is a text box that says 'Type your own'.

If you want to save this description for future cases, click the button labeled “Save these Items as Default”.

More and more documents are being generated electronically, such as PDF files, Word Documents and digital images. Having a single place to keep these documents, or a place to scan paper documents for permanent digital storage is becoming a fast way to retrieve these documents for future use. TerraPro allows you to manage the “paperless” office by storing documents related to a case right within the program. To get started, click the “*Manage Images*” button to the right of the Obituary.



You can store an unlimited number of documents in TerraPro’s filing system, and instantly retrieve them. Document formats include Adobe PDF, Microsoft XPS and MDI, and scanned images in JPEG or Bitmap (bmp) formats. You can also enter a short description of the document, including the source and the date received.

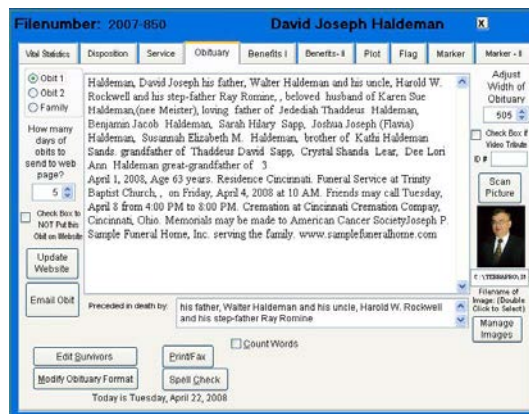
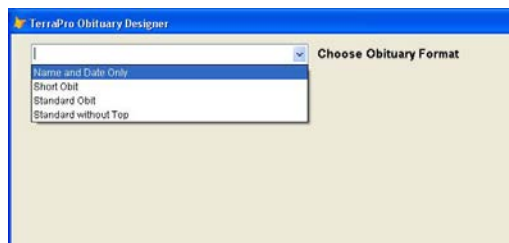


On the image list, click the name of the image to bring it up. If it is a picture, Dbl-click the picture to use the Microsoft Windows Picture and Fax Viewer to examine or print the image.

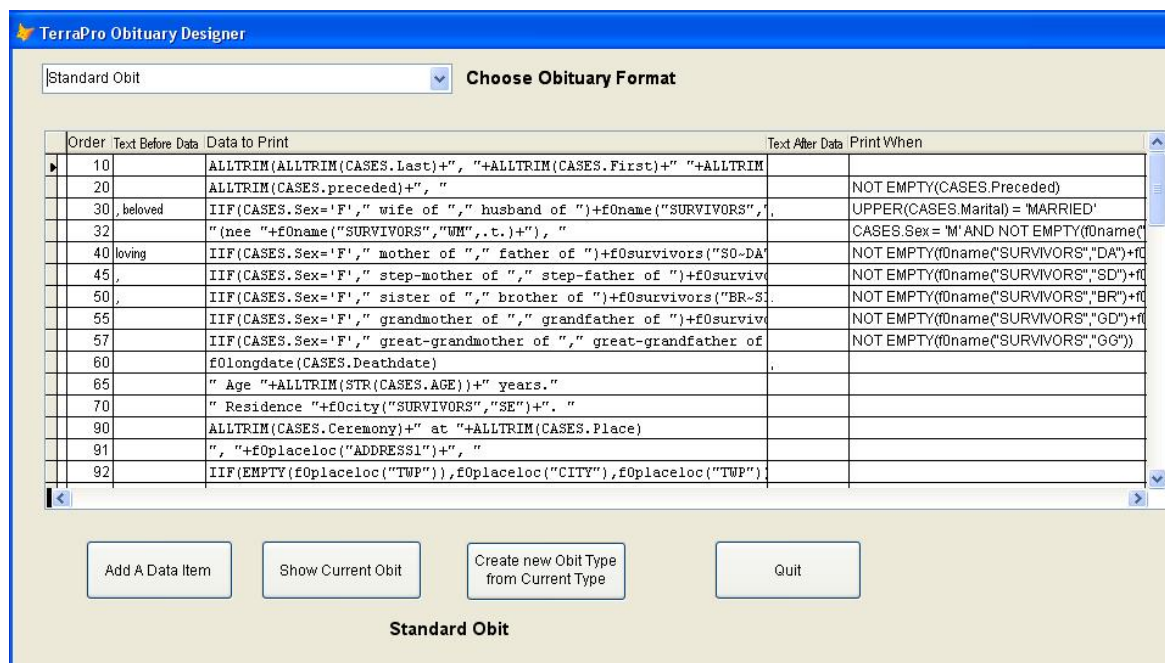
This section is for users who feel they can handle a little bit of FoxPro to change the way the automatic Obit Writer (CTRL-O) writes the obit. Others may wish to call Terradise Computer Systems, Inc. personnel for help (free for the first few minutes – then we can let you know if you are getting into some chargeable time.)

On the Obituary Page click the button in the lower left that says “*Modify Obituary Format*”:

This will bring up a pulldown list of the types of obituary formats you have stored on your computer:



If you choose Standard Obit (the one which CTRL-O writes by default), something like the following will appear:

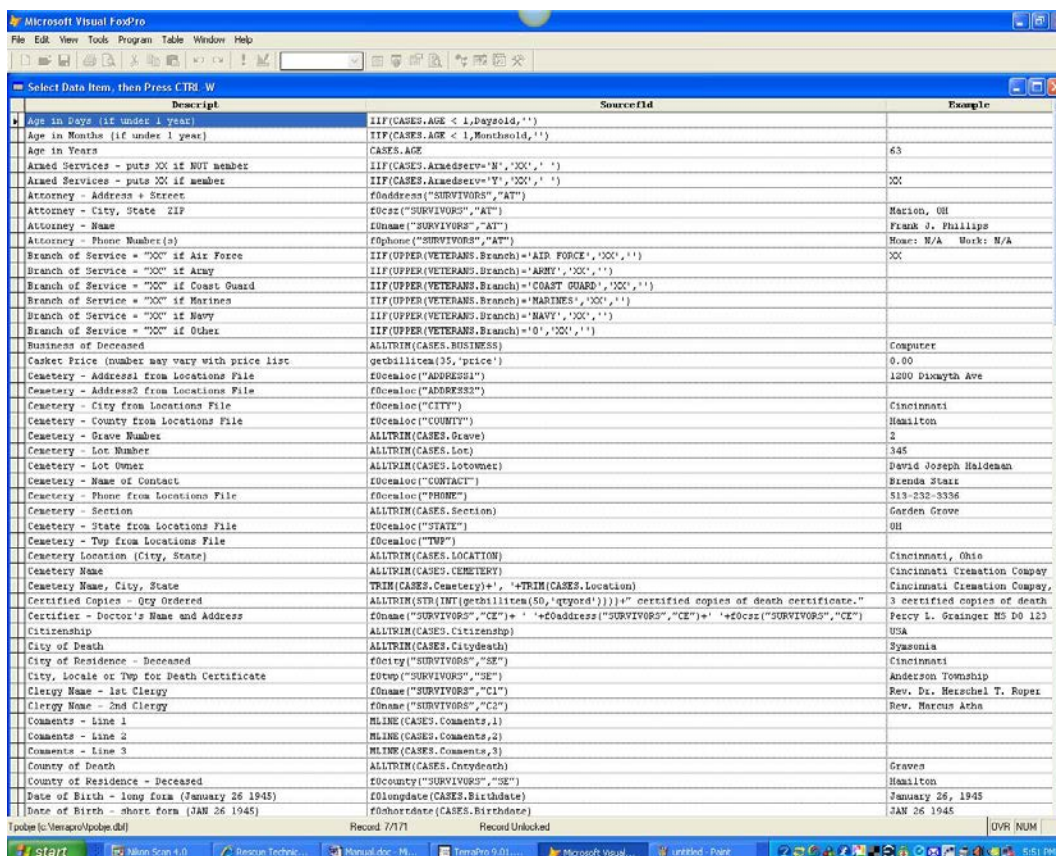


This is nothing more than a list of all the FoxPro expressions (formulas) that construct the obituary from the data you have entered. They do so in the order specified at the left. If there is fixed text to put BEFORE the data, the next column shows that text.

The Data to Print column contains FoxPro expressions or formulas that extract the data from the case files. WE DO NOT EXPECT YOU TO MEMORIZE OR KNOW ALL THESE EXPRESSIONS. You can, however, use them as a basis for constructing your own customized obituary text.

If you click on the button that says “*Show Current Obit*” you can see how this group of expressions produces the obituary. You can also click the pulldown list and see other formats (if they have been saved).

To see how data items can be added to your obits, scroll to the bottom of the *Data to Print* list, and add a new blank line (if not already a blank line at the end). Place the mouse on the blank *Data to Print* column, and right-click. You will see this list:



You can scroll down through this list and choose any FoxPro expression that gives you the data you wish to see. Scroll to the appropriate line and press CTRL-W and the expression will be pasted to the empty line. (For a complete list, see Appendix C) Note that the value of the expression is calculated and presented in the third column (far right).

It is also possible to add new expressions to the list – use CTRL-Y to add a new line. You can cut and paste an expression that is close to the one you want, and then modify it. To find out how to use a user-defined function (they start with f0), put a question mark in quotes (“?”) right after the first parentheses. When you leave the field, a message will pop up showing the usage of the function:



You can create new obituary formats by saving one of the existing formats as a new one, then modifying the new one to suit. The new format will be added to the list automatically.

If your list contains more than one style of obituary, when you press CTRL-O, you will be asked to select which style of obituary you wish to use.

With nearly unlimited obituary formats, and the ability to save up to three obituary styles with each case, you should be able to meet the needs of several local papers at the same time.

ADDING HEADERS TO MEMORIAL CARDS

One of the features of CardShop is the ability to edit the card on the screen, without having to use the Edit Data button to change information.

However, the headers (such as DATE BORN, DATE DIED etc.) may need to be adjusted so that they can be edited, too. In the past, the headers were fixed text added to the card in the FoxPro Report Generator.

The current version of TerraPro now allows those headers to be edited by using a reference to them such as Header1, Header2, Header3 etc through Header20.

Edit the Layout of the card by clicking the Modify button:

A warning will come up advising you that you will be making changes to the form. Click Yes to continue. (if you feel uncomfortable editing a working card, use the “Clone this Card” button to make a copy of it – then you can make changes freely without affecting the original)



Change your card to match the sample below:

Notice that the ceremony type will be extracted from the CARD.Ceremony field, so it does not need a CARD.Header field. The same applies to the Disposition (Burial, Interment, etc)

Replace your old fixed headers with new objects as shown next to ☆ above and save the new card using CTRL-W.

The next step is to setup defaults for what those headers will be.

RIGHT-CLICK the pulldown next to the "Choose Card" selection. You will see something like the following:

Appendix E - Crematory

MANAGE YOUR CREMATORY

With the optional cremation module, TerraPro can work with your existing cases to gather the information required for running a crematory. You will be able to bill other funeral homes for performing cremations, and print cremation certificates, cards and reports.

Call Terradise personnel at 513-484-9729 to add this module to your existing TerraPro installation.

If you intend to cremate for other funeral homes in your area, a separate company will be added to your TerraPro installation. This will allow you to set up a price list for cremations and other services and merchandise you provide.

To access this company, choose it from the list of installed companies from your TerraPro opening screen:



Select the Crematory from your list of installed companies

Just like in the funeral home version of TerraPro, your cases may be accessed using the pulldown menu. But notice the menu selection titled Crematory. This is how you access the screens which show cremation-specific information.

[Add New Case](#)
[Edit Survivors](#)
[Write Obit](#)
[Edit Current Case](#)
[Arrangements](#)
[Edit Bill](#)
[Crematory](#)
Forms, Reports
[Forms / Reports](#)
[Card Shop](#)



Clicking the Crematory button brings up the Crematory Case Screen:

CREMATORY

Joseph P. Sample Crematory

Joseph Norman Thomas

Deceased	Billing	Process Log	Emissions
Filenumber: 2014-018			
First: Joseph Middle: Norman Last: Thomas			
Race: White Sex: M Social Security #: 666-66-6666 <-- Search by SSN			
Birthdate: 06/06/1906 Deathdate: 06/09/2014 Time of Death: 1 AM Age: 108			
Weight: 87 <input type="checkbox"/> Autopsy? <input type="checkbox"/> Embalmed? <input type="checkbox"/> Pacemaker?			
Artificial Joints or Limbs:			
<input type="checkbox"/> Family to be Present at Cremation? Cremation Date: 09/06/2014 <-- Search by Cremation Date			
Time: 10 AM			
Disk #: 018 District #: County of Death:			
Cause of Death:			

Top Prev Next Bottom Copy Print Label Print Info Print Process Log Print Certificate Add Delete

☐ Modify Report Layout Import

Exit

Deceased Vital Statistics

This is the main editing screen for your crematory. From here you can copy a case from the current TerraPro case file, or import one from the other branches. If the cremation is for another funeral home, you can Add a new case and enter the information directly on the screen, and bill the charges to the funeral home.

Two Scenarios:

1. If the case is for another funeral home, the billing is done on the TerraPro Billing screen. Then a monthly statement can be generated from the Crematory Billing Screen for each funeral home you serve. TerraPro personnel will assist you in setting up your crematory price list and default bills when you purchase the crematory module.
2. If the case is from your funeral home, use the Copy option on the crematory screen to copy the current TerraPro case into the crematory. You will not need the billing screen unless you treat the crematory as a separate accounting entity.

Process Log:

The process log lets you keep track of the details of cremation:

The screenshot displays the 'CREMATORY' software window. The title bar shows 'CREMATORY' and standard window controls. The main window has a header with 'Joseph P. Sample Crematory' on the left and 'Joseph Norman Thomas' on the right. Below the header is a tabbed interface with four tabs: 'Deceased', 'Billing', 'Process Log' (which is selected), and 'Emissions'. The 'Process Log' tab contains a form with various fields for recording cremation details. At the top of the form is a 'Special Instructions' text box containing 'Remove Rings'. Below this are several rows of data entry fields, each with a label and a corresponding input box or dropdown menu. The fields include: 'Date Delivered to Crematory' (09/06/2014 09:45:00 AM), 'By' (Funeral Home), 'Logged in by Crematory Rep' (DJH), 'Type of Cremation Container' (Cardboard Box), 'Remains placed in retort by' (DJH), 'Date : Time Placed' (09/06/2014 10 AM), 'Remains taken from retort by' (DJH), 'Date : Time Removed' (09/06/2014 02:30:00 PM), 'Type of Urn/Container' (Batesville U8782R), 'Date : Time Inurned' (// : : AM), 'Cremains placed in urn/container by' (empty), 'Date : Time Notified' (// : : AM), 'Chapel/Funeral Home notified cremains ready by' (empty), 'Spoke to (contact)' (empty), 'Who Returned Cremains to FH?' (empty), and 'Date : Time Accepted' (// : : AM). At the bottom of the form is a 'Special Notations' text box. Below the form is a row of buttons: 'Top', 'Prev', 'Next', 'Bottom', 'Copy', 'Print Label', 'Print Info', 'Print Process Log', 'Print Certificate', 'Add', and 'Delete'. Below these buttons is a checkbox labeled 'Modify Report Layout' and an 'Import' button. On the far right is a red circular button with a white 'X' and the word 'Exit' below it.

Field	Value
Special Instructions	Remove Rings
Date Delivered to Crematory	09/06/2014 09:45:00 AM
By	Funeral Home
Logged in by Crematory Rep	DJH
Type of Cremation Container	Cardboard Box
Remains placed in retort by	DJH
Date : Time Placed	09/06/2014 10 AM
Remains taken from retort by	DJH
Date : Time Removed	09/06/2014 02:30:00 PM
Type of Urn/Container	Batesville U8782R
Date : Time Inurned	// : : AM
Cremains placed in urn/container by	
Date : Time Notified	// : : AM
Chapel/Funeral Home notified cremains ready by	
Spoke to (contact)	
Who Returned Cremains to FH?	
Date : Time Accepted	// : : AM
Special Notations	

Details like pickup, delivery, urns and personnel are recorded on this screen. When you print the process log for your files, all this information is reported, along with emissions, if any:



CREMATION PROCESS LOG

CREMATION # 2014-018

NAME OF DECEASED: Joseph Norman Thomas

CHAPEL OR OTHER FUNERAL HOME: Clepper Funeral Chapel

SPECIAL INSTRUCTIONS: Remove Rings

DELIVERED TO CREMATORY: DATE: 09/06/2... **TIME:** 9:45 AM **By:** Funeral Home

LOGGED IN BY CREMATORY REPRESENTATIVE: DJH

TYPE OF CREMATION CONTAINER: Cardboard Box

APPROXIMATE WEIGHT OF CONTAINER & DECEASED: 87

REMAINS PLACED IN RETORT BY: DJH **DATE:** 09/06/2... **TIME:** 10 AM

CREMAINS TAKEN FROM RETORT BY: DJH **DATE:** 09/06/2... **TIME:** 2:30 PM

TYPE OF URN/CONTAINER: Batesville U8782R

CREMAINS PLACED IN URN/CONTAINER BY: _____ **DATE** // **TIME:** 12:00 AM

CHAPEL/FUNERAL HOME NOTIFIED CREMAINS READY BY: _____

DATE: // **TIME:** 12:00 AM **SPOKE TO:** _____

WHO RETURNED CREMAINS TO FUNERAL HOME? _____

DATE: ... **TIME:** 12:00 AM

SPECIAL NOTATIONS:

TEMPERATURE MONITOR: ON FILE

VISIBLE PARTICULATE EMISSIONS: ABSENT PRESENT
(If present complete the following)

COLOR: Black

TOTAL TIME DURATION OF EMISSIONS: 1 minute

CORRECTIVE ACTION TAKEN: none

As with all TerraPro forms, this report can be customized for your crematory.

TerraPro will also print a certificate of cremation and a label



CERTIFICATE OF CREMATION

Zanesville, Ohio

September 8, 2014

The undersigned, being on this date the manager of Joseph P. Sample Crematory hereby certifies that the remains of

Joseph Norman Thomas

were cremated on the sixth day of September, 2014.

I further certify that the burial permit, prerequisite to the cremation of remains, accompanied the same, and that it shows June 9, 2014 as the date of death, as the cause and 108 as the age.

No. By: _____

Cremation Certificate

Joseph P. Sample Crematory
6404 Coffey St., Cincinnati, Ohio 45230

Cremation No. 018 Date: 09/06/2014

Name of Deceased

Joseph Norman Thomas

Date of Birth 06/06/1906

Date of Death 06/09/2014

Cause of Death:

Permit No. _____ District No. _____

Representative, Joseph P. Sample Crematory

Label

Appendix F – Australian Version

DIFFERENCES FROM THE U.S. VERSION

Although TerraPro was written for use in the United States, it can adapt itself to use in Australia. When the Setup screen is modified to indicate Australia as the country, several screens change their appearance.

The underlying databases remain the same, but may be presented to the user in a different format that that shown in this manual.


The screens affected include the First Call Screen, and the Edit Case Screens (Vital Statistics, Disposition, Services and Obituary) . In addition, the flag, marker and burial benefits screens have been removed and the military benefits are entered on form D307 from the Vital Statistics Screen.

To simplify data entry, the First Call Screen serves also as the launch screen for accessing all relevant Australian data:

VITAL STATISTICS		SERVICE DETAILS	
First Call Date: <input type="text" value="04/10/2012 12:00 AM"/>		<input type="checkbox"/> DO WE HAVE PRE-ARRANGEMENTS?	
THE LATE: <input type="text" value="Robert David Probos"/>			
ADDRESS AT PASSING: <input type="radio"/> Inpatient <input type="radio"/> ER/Outpatient <input type="radio"/> DOA <input type="radio"/> Nursing Home <input type="radio"/> Residence <input type="radio"/> Hospice <input checked="" type="radio"/> Other (Specify) <input type="text" value="Other (Specify)"/>			
RESIDENTIAL ADDRESS: <input type="text" value="Roger Hemmerly Memorial Rest Home"/>			
TOWN/SUBURB: <input type="text" value="Daytona Beach"/>		STATE: <input type="text" value="FL"/>	
Date of Birth: <input type="text" value="21/02/1936"/>		Date of Death: <input type="text" value="25/09/2014"/>	
		Age - Yrs-Months-Days: <input type="text" value="78"/> <input type="text" value="7"/> <input type="text" value="4"/>	
DOCTOR / CORONER CASE # <input type="text"/>		CORONER CASE # <input type="text" value="5000"/>	
Certifier's Address			
RELEASE FORM FAXED? <input checked="" type="checkbox"/>		GMO? <input type="checkbox"/>	
Date/Time Release Faxed: <input type="text" value="13/04/2015 01:35 PM"/>			
FAMILY / CALLER CONTACT			
RELATIONSHIP: <input type="text" value="Spouse"/>			
NAME: <input type="text" value="Georgia May Foolery"/>			
ADDRESS: <input type="text" value="993 Roo Way"/>			
TOWN/SUBURB, STATE: <input type="text" value="Springtown, VIC 4439"/>			
HOME PHONE: <input type="text" value="+34 3 1121"/>			
CELL PHONE: <input type="text" value="+61 3 3444 2222"/>			
EMAIL: <input type="text" value="gmf@gmf.com"/>			
Click here to continue...			
<input type="button" value="Quit"/>			

The 2nd tab of this screen includes service information:

VITAL STATISTICS **SERVICE DETAILS**

 <- RIGHT CLICK TO USE EVENT CALENDAR

SERVICES

SERVICE DATE AND TIME: 27 September, 2014 4:00 PM

CREMATION / BURIAL: Cremation Crematory: Greater Cincinnati Crematory

Cemetery: Marion Cemetery Notes about Ashes

Cemetery Location: (City, State) Zanesville, Ohio Place of Inurnment: Scattered in the Olentangy River at T

Inurnment: Town/Suburb, State: 1536 Whetstone River Road

Notes about Disposition: SECTION: GARDEN2

LOT: 17 GRAVE: 1

CHAPEL / CHURCH: Joseph P. Sample Funeral Home, Inc.

VIEWING / ROSARY: Saturday, 27 September, 2014 from 2:01 PM-4:30 PM at Joseph P. Sample f

CELEBRANT / CLERGY: (none)

ADD'L CELEBRANT / CLERGY: (none)

FUNERAL NOTICE: Probos, Robert David preceded in death by an uncle, Heironymous Bosch. American Kidney Fund. 6110 Executive Boulevard Suite 1010 Rockville, MD

DEATH NOTICE: Ethan Allen Probos, age 65, died Monday, September 20, 2010 at his resid

[Click here Continue to Billing Selections](#) **CHEQUES** **ENTER PAYMENTS**

ENTER Births, Deaths and Marriages **BDM**

Quit

From these two screens, the user can access the Event Calendar and Billing Screens. The BDM button allows the entry of Birth, Death and Marriage information, as well as parents, spouse(s) siblings and children. This information can then be electronically submitted to the proper state authorities' websites.

Remember to pass your mouse over each field for tips on entering data into that field.

The Survivors screen and the Case Data screen as described in the U.S. version in this manual can be accessed by RIGHT-CLICKING the menu choices Edit Current Case and Edit Survivors in the Australian version.

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